

Exam Code: MB-210
Exam Name: Microsoft Dynamics 365 for Sales

01 - Perform Configuration

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 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 for Sales system customizer.

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

Solution: Use Dynamics 365 AI for Sales.

Does the solution meet the goal?

- A. Yes
- B. No

Correct Answer: B

Section:

Explanation:

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

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, 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 for Sales system customizer.

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

Solution: Add the LinkedIn Sales Navigator Contact (member profile) control.

Does the solution meet the goal?

- A. Yes
- B. No

Correct Answer: A

Section:

Explanation:

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

QUESTION 3

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 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

Correct Answer: B

Section:

Explanation:

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

QUESTION 4

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

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

A company 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. Yes
- B. No

Correct Answer: A

Section:

QUESTION 5

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

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

A company 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

Correct Answer: B

Section:

QUESTION 6

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After you answer a question, you will NOT be able to return to it. As a result, these questions will not appear in the review screen. A company plans to move their headquarters from the United States to Europe.

You need to round all currency values to four decimal places and display the correct currency symbol. Solution: Change the default currency.

Does the solution meet the goal?

- A. Yes
- B. No

Correct Answer: B

Section:

QUESTION 7

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

Correct Answer: B

Section:

Explanation:

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

QUESTION 8

You are a Dynamics 365 administrator.

A sales manager changes the target goal for a salesperson from \$26,000.00 to \$20,000.00. However, the currency symbol changes from \$ to Â£. Other managers are not experiencing this issue. You need to fix the currency symbol for the sales manager.

What should you change?

- A. the default currency in personal options
- B. the currencies in settings
- C. the currency display option in system settings
- D. the current format in personal options

Correct Answer: A

Section:

QUESTION 9

You are Dynamics 365 for Sales administrator.

Sales representatives must enter estimated revenue only as an exception.

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

What should you do?

- A. In the System Settings sales tab, change the default revenue type to System Calculated
- B. In custom controls, change the default revenue setting to System Calculated
- C. In Personalization settings for each user, change the default revenue type to System Calculated
- D. In Opportunities, change the default value of the revenue type to System Calculated

Correct Answer: D

Section:

QUESTION 10

You manage a default Dynamics 365 Sales environment. You are configuring a sales dashboard.
You need to create an interactive dashboard.
Which three entities can you use? Each correct answer presents a complete solution.
NOTE: Each correct selection is worth one point.

- A. Queue Item
- B. Opportunity
- C. Knowledge Article
- D. Case
- E. Invoice

Correct Answer: A, C, D

Section:

Explanation:

Reference: <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/customize/configure-interactive-dashboards>

QUESTION 11

You have opportunities that have values in multiple currencies. The currency exchange rate automatically updates. You need to ensure that currency values are accurately reported.
When is the new currency exchange rate applied to the opportunity records?

- A. when a change is made to a currency field
- B. when a user opens the opportunity record
- C. when a user manually recalculates opportunity
- D. when the calculate rollup field system job for the msdyn_projectteam entity runs

Correct Answer: A

Section:

QUESTION 12

A company plans to close early on the last day of the month for an employee celebration.
You need to configure Dynamics 365 to prevent scheduling of sales support resources for that day.
Which feature should you use?

- A. Events
- B. Business closure
- C. Fiscal calendar
- D. Time off request

Correct Answer: B

Section:

Explanation:

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

QUESTION 13

An organization uses sales dashboards in Dynamics 365.

You need to configure a single dashboard that includes the following data:

both complex key performance indicators that are derived from external data and custom visuals real-time data on sales performance that is based on Dynamics 365 data.

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

NOTE: Each correct selection is worth one point.

- A. Add the external data as virtual entities in Dynamics 365 and use it for the dashboard visualizations.
- B. Create all visuals in a Microsoft Power BI dashboard. Embed the dashboard in Dynamics 365.
- C. Create tiles and a dashboard in Microsoft Power BI.
- D. Create charts with required data in Dynamics 365.
- E. Combine Microsoft Power BI and standard charts on a standard dashboard in Dynamics 365.

Correct Answer: A, B, E

Section:

QUESTION 14

You are an administrator for Dynamics 365 for Sales.

You need to ensure that a user can install and configure the Social Selling Assistant.

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

NOTE: Each correct selection is worth one point.

- A. Grant the user the sales manager role
- B. Assign the user a license for Microsoft Dynamics 365 (online) or Microsoft Social Engagement
- C. Assign the user a license for both Microsoft Dynamics 365 (online) and Microsoft Social Engagement
- D. Grant the user the system administrator or system customizer role

Correct Answer: C, D

Section:

Explanation:

Reference: [https://docs.microsoft.com/en-us/previous-versions/dynamicscrm-2016/administering-dynamics-365/mt793319\(v=crm.8\)](https://docs.microsoft.com/en-us/previous-versions/dynamicscrm-2016/administering-dynamics-365/mt793319(v=crm.8))

QUESTION 15

A company uses Dynamics 365 for Sales. The company has not made changes to any of the default security roles. You need to ensure that users can assign salespeople to sales territories.

Which security role can you use?

- A. Delegate
- B. Sales Person
- C. Sales Manager
- D. System Customizer

Correct Answer: D

Section:

Explanation:

Reference: <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/admin/set-up-sales-territories-organize-business-markets-geographical-area>

QUESTION 16

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

Correct Answer: B

Section:

QUESTION 17

An organization uses Dynamics 365 for Sales.

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

What should you do?

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

Correct Answer: C

Section:

Explanation:

Reference:

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

QUESTION 18

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A company plans to move their headquarters from the United States to Europe.

You need to round all currency values to four decimal places and display the correct currency symbol.

Solution: Add a new currency and configure the currency precision and symbol.

Does the solution meet the goal?

- A. Yes
- B. No

Correct Answer: A

Section:

QUESTION 19

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

After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen. You use business process flows for all Dynamics 365 opportunities.

Some opportunities are closed before business process flow durations are calculated.

You need to ensure that business process flow duration values are calculated.

Solution: When closing an opportunity, use the Close as Won dialog.

Does the solution meet the goal?

A. Yes

B. No

Correct Answer: B

Section:

QUESTION 20

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.

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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. Yes

B. No

Correct Answer: A

Section:

QUESTION 21

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.

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Some opportunities are closed before business process flow durations are calculated.

You need to ensure that business process flow duration values are calculated.

Solution: Change the opportunity to an inactive state.

Does the solution meet the goal?

A. Yes

B. No

Correct Answer: B

Section:

QUESTION 22

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

Correct Answer: D

Section:

Explanation:

Reference: <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/admin/set-up-sales-territories-organize-business-markets-geographical-area>

QUESTION 23

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

Correct Answer: A

Section:

Explanation:

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

QUESTION 24

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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

Correct Answer: B

Section:

QUESTION 25

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: Create a subscription to Microsoft Relationship Sales, enable JavaScript, and disable pop-up blockers. Does the solution meet the goal?

- A. Yes
- B. No

Correct Answer: A

Section:

QUESTION 26

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: Remove any subscriptions associated with Microsoft Relationship Sales and disable JavaScript. Does the solution meet the goal?

- A. Yes
- B. No

Correct Answer: B

Section:

QUESTION 27

You are a Dynamics 365 administrator for a company. The company's fiscal year is April 1 through March 31. You need to create a system view for all users that displays data for the current fiscal year by default. What should you do?

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

Correct Answer: A

Section:

QUESTION 28

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

Correct Answer: A

Section:

Explanation:

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

QUESTION 29

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. Sales Person
- B. Knowledge Manager
- C. System Customizer
- D. CEO - Business Manager

Correct Answer: C

Section:

QUESTION 30

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

Managers must be able to determine how the relationship with customers is trending for each opportunity. You need to implement a solution.

Which solution should you implement?

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

Correct Answer: D

Section:

QUESTION 31

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

Correct Answer: A

Section:

QUESTION 32

HOTSPOT

You are a Dynamics 365 for Sales administrator. You have an interactive experience leads dashboard. You need to create a filtered view of the dashboard.

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

NOTE: Each correct selection is worth one point.

Hot Area:

Answer Area

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

Answer Area:

Answer Area

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

Section:

Explanation:

QUESTION 33

HOTSPOT

You are a Dynamics 365 Sales environment.

You need to implement the Social Selling Assistant.

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

NOTE: Each correct selection is worth one point.

Hot Area:

Answer Area

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

Answer Area:

Answer Area

Requirement

Technology or feature

Install and configure additional required software.

Technology or feature
Social engagement
Dynamics 365 AI for Sales

Ensure that Social Assistant can be used on a dashboard

Technology or feature
Relationship Assistant
Search topics

Section:

Explanation:

QUESTION 34

HOTSPOT

You manage a Dynamics 365 environment. You plan to implement business process flows from AppSource. You need to ensure that you can install the business process flows. Which actions should you perform? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

Answer Area

Task

Action

Configure security

Action
Assign the user the Office 365 Global Admin role
Assign the Dynamics 365 System Customizer Security role

Deployment action

Action
Select the organization for installation
Publish all customizations

Answer Area:

Answer Area

Task	Action
Configure security	<ul style="list-style-type: none">Assign the user the Office 365 Global Admin roleAssign the Dynamics 365 System Customizer Security role
Deployment action	<ul style="list-style-type: none">Select the organization for installationPublish all customizations

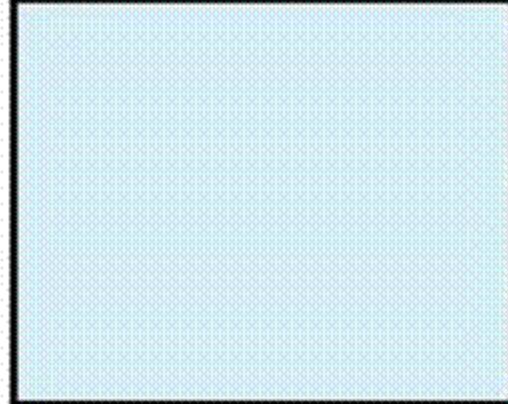
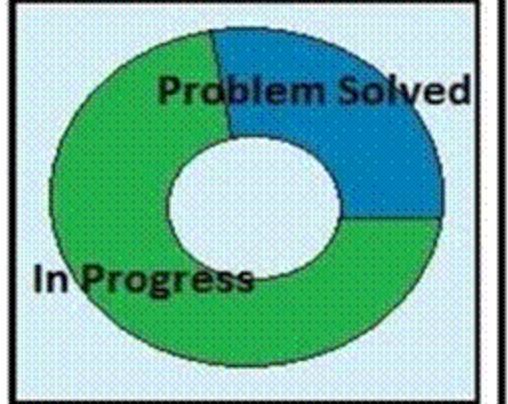
Section:

Explanation:

QUESTION 35

HOTSPOT

You run an Account Overview report for Fourth Coffee. The following results are displayed.

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

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:

Answer Area CEplus.com

Question

Why is the satisfaction area blank?

Answer choice
There are no closed cases
Users are not completing the satisfaction field
<input checked="" type="checkbox"/> The Reporting Service is down
Cases with the problem solved have not been closed

Which type of account is Fourth Coffee?

Answer choice
Active
Parent Account
Inactive
<input checked="" type="checkbox"/> Child Account

Answer Area:

Answer Area CEplus.com

Question

Why is the satisfaction area blank?

Answer choice
There are no closed cases
<input checked="" type="checkbox"/> 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?

Answer choice
Active
<input checked="" type="checkbox"/> Parent Account
Inactive
Child Account

Section:

Explanation:

QUESTION 36

HOTSPOT

A company uses Dynamics 365 for Sales.

You need to reduce the number of pre-sales support days that are available based on the days the company is closed for public holidays. How should you configure the schedule? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

Answer Area

Item

Schedule type

Value

Holiday
Recurrence

Option

Number of days
Owner

Answer Area:

Answer Area

Item	Value
Schedule type	Holiday
Option	Number of days

Section:

Explanation:

QUESTION 37

HOTSPOT

You are a Dynamics 365 for Sales administrator.

You create the following flow.



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:

Answer Area

You need to see time spent in the Qualify stage. What should you do?

Create a SSRS report.
Create a FetchXML report.
Add a custom field to store the time.
Add a data step to store the time.

You need to return to the Develop stage and make a change. What happens to the process flow?

The Propose stage becomes inactive and the Develop stage becomes active.
The Propose stage remains active and the Develop stage becomes active.
The Propose stage remains active and the Develop stage becomes revised.

Answer Area:

Answer Area

You need to see time spent in the Qualify stage. What should you do?

Create a SSRS report.
Create a FetchXML report.
Add a custom field to store the time.
Add a data step to store the time.

You need to return to the Develop stage and make a change. What happens to the process flow?

The Propose stage becomes inactive and the Develop stage becomes active.
The Propose stage remains active and the Develop stage becomes active.
The Propose stage remains active and the Develop stage becomes revised.

Section:

Explanation:

QUESTION 38

HOTSPOT

You have a dashboard that shows the number of completed calls and cancelled calls in a chart. Sales Representatives mark completed calls by using one of the following values: Wrong Number, Left Message, or Connected.

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

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

NOTE: Each correct selection is worth one point.

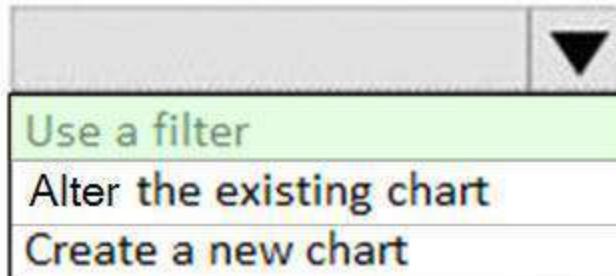
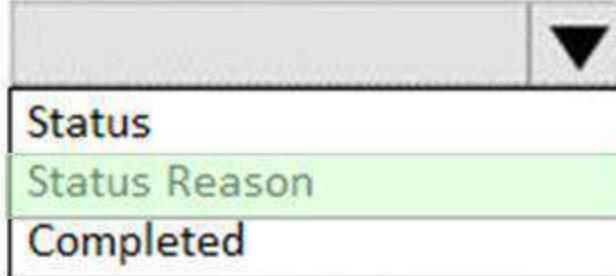
Hot Area:

Answer Area

Requirement	Value or action
Modification to make	<div style="border: 1px solid black; padding: 5px;"><p>▼</p><ul style="list-style-type: none">Use a filterAlter the existing chartCreate a new chart</div>
Value to use	<div style="border: 1px solid black; padding: 5px;"><p>▼</p><ul style="list-style-type: none">StatusStatus ReasonCompleted</div>

Answer Area:

Answer Area

Requirement	Value or action
Modification to make	 <ul style="list-style-type: none">Use a filterAlter the existing chartCreate a new chart
Value to use	 <ul style="list-style-type: none">StatusStatus ReasonCompleted

Section:

Explanation:

QUESTION 39

HOTSPOT

You manage a Dynamics 365 Sales environment.

You need to create a dashboard that lists customers and their activities. The dashboard must include tiles that are permanently displayed.

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

NOTE: Each correct selection is worth one point.

Hot Area:

Answer Area

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

Answer Area:

Answer Area

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

Section:

Explanation:

Reference:

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

QUESTION 40

HOTSPOT

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.

Hot Area:

Answer Area

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

Answer Area:

Answer Area

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

Section:

Explanation:

Reference:

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

QUESTION 41

HOTSPOT

A company wants to implement the Forecast Management feature in Dynamics 365 Sales.

The company plans to use the Opportunity Status Reason field to indicate that sales have closed. They want to use settings based on the organizational reporting structure. Salespeople must only see their own forecasts.

You need to select the appropriate settings to meet the company's requirements.

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

NOTE: Each correct selection is worth one point.

Hot Area:

Answer Area

Requirement	Setting								
Hierarchical route	<table border="1"><tr><td>Owner</td><td>▼</td></tr><tr><td>User</td><td></td></tr><tr><td>Contact</td><td></td></tr><tr><td>Manager</td><td></td></tr></table>	Owner	▼	User		Contact		Manager	
Owner	▼								
User									
Contact									
Manager									
Permissions - User Lookup field	<table border="1"><tr><td>User</td><td>▼</td></tr><tr><td>Manager</td><td></td></tr><tr><td>Created By</td><td></td></tr><tr><td>None</td><td></td></tr></table>	User	▼	Manager		Created By		None	
User	▼								
Manager									
Created By									
None									

Answer Area:

Answer Area

Requirement	Setting								
Hierarchical route	<table border="1"><tr><td>Owner</td><td>▼</td></tr><tr><td>User</td><td></td></tr><tr><td>Contact</td><td></td></tr><tr><td>Manager</td><td></td></tr></table>	Owner	▼	User		Contact		Manager	
Owner	▼								
User									
Contact									
Manager									
Permissions - User Lookup field	<table border="1"><tr><td>User</td><td>▼</td></tr><tr><td>Manager</td><td></td></tr><tr><td>Created By</td><td></td></tr><tr><td>None</td><td></td></tr></table>	User	▼	Manager		Created By		None	
User	▼								
Manager									
Created By									
None									

Section:

Explanation:

Reference:

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

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

QUESTION 42

HOTSPOT

A sales manager needs to set up goals in Dynamics 365 Sales for salespeople.

The measurement of goals must be based on the total deal amount upon closing an opportunity.

The fiscal year for the goals must be based on the calendar year.

You need to create the rollup query for the goal metrics.

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

NOTE: Each correct selection is worth one point.

Hot Area:

Answer Area

Parameter	Option
Entity	 Lead Quote Opportunity Invoice
Date field	 Actual Close Date Created on Date Final Decision Date
Revenue field	 Total Amount Budget Amount Actual Revenue

Answer Area:

Answer Area

Parameter	Option
Entity	Lead Quote Opportunity Invoice
Date field	Actual Close Date Created on Date Final Decision Date
Revenue field	Total Amount Budget Amount Actual Revenue

Section:

Explanation:

QUESTION 43

DRAG DROP

You use Dynamics 365 Sales.

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

You need to use multiple business process flows.

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

Select and Place:

Actions

- Abandon and then Switch
- Finish and then Switch
- Switch

Answer Area

Scenario

End the current process and start the correct business process flow.

Temporarily leave the current process for a different business process flow.

Action

Action

Action

Correct Answer:

Actions

- Abandon and then Switch
-
-

Answer Area

Scenario

End the current process and start the correct business process flow.

Temporarily leave the current process for a different business process flow.

Action

Finish and then Switch

Switch

Section:

Explanation:

QUESTION 44

DRAG DROP

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.

Select and Place:

Actions
Create a business process flow
Create a child workflow
Create a real-time workflow

Answer Area	
Requirement	Action
<input checked="" type="checkbox"/> Create an email.	Action
Send the email.	<input checked="" type="checkbox"/> Action

Correct Answer:

Actions
Create a business process flow

Answer Area	
Requirement	Action
<input checked="" type="checkbox"/> Create an email.	Create a real-time workflow
Send the email.	<input checked="" type="checkbox"/> Create a child workflow

Section:

Explanation:

QUESTION 45

DRAG DROP

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

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

Emails that contain the words buy or purchase must create a warm-lead record. The words buy and purchase are more important than support or help. Emails that specifically mention ProductA must always create a hot lead for that product regardless of other words mentioned. If none of the targeted words are present in an email, a cold lead must be created. You need to configure the order in which rule items are processed.

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

Select and Place:

Actions

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



Answer Area



Correct Answer:

Actions

Answer Area



Section:

Explanation:

QUESTION 46

DRAG DROP

You are a Dynamics 365 administrator.

You need to configure action cards in Relationship Assistant.

Which action card should you enable for each scenario? To answer, drag the appropriate action cards to the correct scenarios. Each action card may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

Select and Place:

Action cards



- Base
- Email from Microsoft Exchange
- Email engagement
- Today

Answer Area

Scenario	Action card
Upcoming meeting reminder	Action card
An email is opened	Action card



Correct Answer:

Action cards



- Base
-
-
- Today

Answer Area

Scenario	Action card
Upcoming meeting reminder	Email from Microsoft Exchange
An email is opened	Email engagement



Section:

Explanation:

References: <https://community.dynamics.com/crm/b/crmpowerobjects/archive/2018/12/31/enable-and-configure-relationship-assistant>

QUESTION 47

DRAG DROP

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.

Select and Place:



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

Answer Area



Correct Answer:



- Open Data Management
- Open Business Management

Answer Area

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



Section:

Explanation:

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

QUESTION 48

DRAG DROP

You are configuring Dynamics 365 Sales. Your organization has a five-stage sales process comprised of leads, opportunities, client validation, quotes, and orders. You need to ensure that salespeople can move through the sales process and view progress.

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

Select and Place:

Actions

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

Answer Area



Correct Answer:

Actions

Select Web Resources
Create a dialog

Answer Area

Select Customizations
Select Customize the System
Select Processes
Create a process flow



Section:

Explanation:

QUESTION 49

DRAG DROP

You are a Dynamics 365 for Sales administrator.

You need to implement Versium Predict with custom views.

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

Select and Place:

Actions	Answer Area
Add custom views using Versium Predict solution	
Authenticate Versium Predict	
Install Versium Predict from the Dynamics 365 Administration Center	
Install Versium Predict from Microsoft AppSource	
Add custom views using web resources	

Drag the actions from the left column to the right column in the correct sequence. Use the up and down arrows to rearrange the items in the right column.

Correct Answer:

Actions	Answer Area
Add custom views using Versium Predict solution	Install Versium Predict from Microsoft AppSource
Install Versium Predict from the Dynamics 365 Administration Center	Authenticate Versium Predict
	Add custom views using web resources

The correct sequence of actions is: Install Versium Predict from Microsoft AppSource, Authenticate Versium Predict, and Add custom views using web resources.

Section:

Explanation:

QUESTION 50

DRAG DROP

You use opportunities with business process flows in Dynamics 365.

You do not have insight into the amount of time spent per process and when the last stage became active. You need to create views and charts that give you this insight and that allow you to track by the owner of the opportunity. Which three actions should you perform in sequence? To answer, move the appropriate actions from the list of actions to the answer area and arrange them in the correct order.

Select and Place:

Actions

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

Add the owner field from the opportunity to the view.

Add the duration and active stage started on the view of the opportunity.

Create a chart on the business process flow entity and add the new view to include the needed fields.

Create a view of the opportunity entity and include the owner field.

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

Answer Area

Correct Answer:

Actions

Add the duration and active stage started on the view of the opportunity.

Create a chart on the business process flow entity and add the new view to include the needed fields.

Create a view of the opportunity entity and include the owner field.

Answer Area

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

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

Add the owner field from the opportunity to the view.

Section:

Explanation:

QUESTION 51

DRAG DROP

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.

Select and Place:

Filter types	Answer Area
Timeframe filter	Scenario View accounts based on case priority
Visual filter	Scenario View accounts created in the last three months
Global filter	Scenario View accounts by Created On dates
	Filter Type Filter type
	Filter Type Filter type
	Filter Type Filter type

Correct Answer:

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

Section:

Explanation:

Reference:

<https://docs.microsoft.com/en-us/dynamics365/customer-service/customer-service-hub-user-guide-dashboard>

QUESTION 52

DRAG DROP

A company wants to use Dynamics 365 Sales with their internal phone system.

You need to configure Dynamics 365 to use the softphone dialer.

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.

Select and Place:

Actions	Answer Area
Configure the channel provider	
Download and import the Dynamics 365 Channel Integration Framework	
Enable for mobile client	
Set up server-side synchronization	
Navigate to the Channel Integration Framework application	
Enable Microsoft Teams integration	

Correct Answer:

Actions	Answer Area
	Download and import the Dynamics 365 Channel Integration Framework
	Navigate to the Channel Integration Framework application
Enable for mobile client	
Set up server-side synchronization	
	Configure the channel provider
	
Enable Microsoft Teams integration	

Section:

Explanation:

Reference:

<https://docs.microsoft.com/en-us/dynamics365/ai/sales/integrate-sample-softphone>

<https://docs.microsoft.com/en-us/dynamics365/customer-service/channel-integration-framework/configure-channel-provider-channel-integration-framework>

QUESTION 53

A company is implementing Dynamics 365 Sales. The company has ten products and four territories. Each territory must have a price list specific for the territory and must use these prices as default product prices. You need to configure the price lists for the territories. What should you do?

- A. Create a product family with each product list four times. Include the territory price for each product list.
- B. Create a price list with a discount list for each territory.
- C. Create a price list for each territory and add a territory relationship record.
- D. Create one price list and margin for each territory.

Correct Answer: C

Section:

Explanation:

Reference:

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

QUESTION 54

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

- A. Pound sterling
- B. Euro
- C. USD
- D. Peso

Correct Answer: C

Section:

Explanation:

Reference:

<https://blog.magnetismsolutions.com/blog/colinmaitland/2019/05/20/dynamics-365-currency-configuration-for-price-list-items>

QUESTION 55

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

Correct Answer: C, D

Section:

Explanation:

Reference:

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

QUESTION 56

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

Correct Answer: C

Section:

Explanation:

Reference:

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

QUESTION 57

A company uses special pricing for bulk purchases of products.

A sales team member cannot create pricing lists for preferred customers.

You need to set up a discount price list.

What are three possible security roles that can be used? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

- A. Sales Team Member
- B. Vice President of Sales
- C. Sales Manager
- D. CEO-Business Manager
- E. President of Sales

Correct Answer: B, C, D

Section:

QUESTION 58

HOTSPOT

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

Hot Area:

Answer Area

Requirement	Setting
Determine the number of territories.	<ul style="list-style-type: none">Four territories and zero sub-territoriesTwo territories and two sub-territoriesOne territory and three sub-territoriesOne territory and four sub-territories
Determine how many territories in which the Jacksonville salespeople should be members.	<ul style="list-style-type: none">One territory and one sub-territory: Florida and JacksonvilleOne sub-territory: JacksonvilleTwo territories: Florida and JacksonvilleOne territory: Florida
Determine how many territories the Florida sales manager should manage	<ul style="list-style-type: none">One territory and zero sub-territory: FloridaOne territory and three sub-territories: Florida, Jacksonville, Miami, and TampaFour territories: Florida, Jacksonville, Miami, and TampaZero territories and three sub-territories: Jacksonville, Miami, and Tampa

Answer Area:

Answer Area**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

Section:**Explanation:****Reference:**

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

QUESTION 59

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

Correct Answer: A**Section:****QUESTION 60**

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

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

Each entity has the following number of stages and steps:

Entity	Number of Stages	Number of Steps per Stage
Lead	10	10
Opportunity	10	10
Quote	10	10
Order	10	10
Invoice	10	10

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

What should you reduce?

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

Correct Answer: B

Section:

Explanation:

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

Reference:

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

QUESTION 61

HOTSPOT

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.

Hot Area:

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

Answer Area:

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

Section:

Explanation:

Reference:

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

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

QUESTION 62

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

Correct Answer: A

Section:

Explanation:

Reference:

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

QUESTION 63

DRAG DROP

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.

Select and Place:

Actions

Navigate to Opportunities and select the Flow option.

Select a Business Process Flow.

Navigate to Processes.

Edit the Process name.

Answer Area

Correct Answer:

Actions

Navigate to Opportunities and select the Flow option.

Select a Business Process Flow.

Navigate to Processes.

Edit the Process name.

Answer Area

Navigate to Processes.

Navigate to Processes.

Edit the Process name.

Section:

Explanation:

Reference:

<https://docs.microsoft.com/en-us/dynamics365/customerengagement/on-premises/customize/create-business-process-flow?view=op-9-1>

QUESTION 64

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: Create a Power Automate flow to track the activities.

Does the solution meet the goal?

- A. Yes
- B. No

Correct Answer: B

Section:

Explanation:

Activity tracking is enabled in the Playbook template.

Reference:

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

QUESTION 65

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

Correct Answer: B

Section:

Explanation:

Activity tracking is enabled in the Playbook template.

Reference:

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

QUESTION 66

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

After you answer a question, you will NOT be able to return to it. As a result, these questions will not appear in the review screen. A company uses Dynamics 365 Sales.

You create a playbook to send documents to new sales managers.

You need to configure the system to record all activity associated with each playbook.

Solution: Enable the playbook in Playbook settings.

Does the solution meet the goal?

- A. Yes
- B. No

Correct Answer: B

Section:

Explanation:

Activity tracking is enabled in the Playbook template.

Reference:

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

QUESTION 67

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

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

A company uses Dynamics 365 Sales.

You create a playbook to send documents to new sales managers.

You need to configure the system to record all activity associated with each playbook.

Solution: Edit the playbook template and set the value of the Track Progress option to yes.

Does the solution meet the goal?

- A. Yes
- B. No

Correct Answer: A

Section:

Explanation:

Activity tracking is enabled in the Playbook template.

Reference:

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

QUESTION 68

HOTSPOT

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.

Hot Area:

Answer Area

Requirement	Configuration
Set up playbooks for tracking activities.	<ul style="list-style-type: none">▼<ul style="list-style-type: none">SettingsActivitiesTemplatesCategories
Set up record types for playbooks.	<ul style="list-style-type: none">▼<ul style="list-style-type: none">Accounts and ContactsPhone calls and AppointmentsAccounts, Contacts, and ActivitiesAccounts, Contacts, and Sales literature

Answer Area:

Answer Area

Requirement	Configuration
Set up playbooks for tracking activities.	<ul style="list-style-type: none">▼<ul style="list-style-type: none">SettingsActivitiesTemplatesCategories
Set up record types for playbooks.	<ul style="list-style-type: none">▼<ul style="list-style-type: none">Accounts and ContactsPhone calls and AppointmentsAccounts, Contacts, and ActivitiesAccounts, Contacts, and Sales literature

Section:

Explanation:

Reference:

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

QUESTION 69

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

Correct Answer: C, E

Section:

Explanation:

Reference:

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

QUESTION 70

DRAG DROP

You manage a Dynamics 365 for 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.

Select and Place:

Actions

Configure Automatic Record Creation and Update Rules.

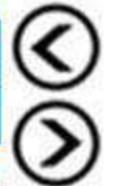
Open System Jobs.

Open Business Management.

Open Settings.

Open Data Management.

Answer Area



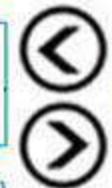
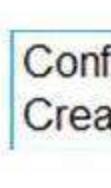
Correct Answer:

Actions

- Open Settings.
- Open System Jobs.
-
- Open Data Management.

Answer Area

- Open Settings.
- Open Business Management.

  Configure Automatic Record Creation and Update Rules.  

Section:

Explanation:

QUESTION 71

- A. Yes
- B. No

Correct Answer: A

Section:

Explanation:

Reference:

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

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

QUESTION 72

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

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

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

Utah to California is the West territory

Illinois to Colorado is the Central territory.

Maine to Indiana is the East territory.

The company wants the territories set up as follows:

Salespersons 1 and 2 sell in the West territory.
Salespersons 5 and 6 sell in the Central territory.
Salespersons 3 and 4 sell in the East territory.
Postal code for each state used as the location.
You need to set up the territories.

Solution:

Create the West territory, add the manager, and save.
Repeat for the Central and East territories.
Add the members for each territory.
Select Related and add the Resource territories.
Does the solution meet the goal?

- A. Yes
- B. No

Correct Answer: B

Section:

Explanation:

Reference:

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

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

QUESTION 73

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

Correct Answer: B

Section:

Explanation:

Reference:

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

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

QUESTION 74

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. Sales Person
- B. Delegate
- C. System Customizer
- D. CEO – Business Manager

Correct Answer: D

Section:

QUESTION 75

DRAG DROP

You are a Dynamics 365 Sales administrator.

You need to ensure that each salesperson can perform the following tasks when new leads are added to the system:

Create an appointment

Add documentation.

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

Select and Place:

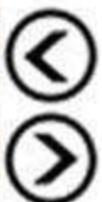
Action

Add steps to stage.

Add activities.

Publish the solution.

Choose Business Process Flow.



Add Playbook templates.



Choose App Settings.

Add a stage.

Activate processes.

Answer Area



Correct Answer:

Action

Add steps to stage.

Answer Area

Choose App Settings.

Add Playbook templates.

Add activities.

Choose Business Process Flow.



Publish the solution.



Add a stage.

Activate processes.

Section:

Explanation:

Reference:

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

QUESTION 76

HOTSPOT

A company uses Dynamics 365 Sales. You add the Kanban control to the Opportunity entity.

You plan to implement Kanban views in the system. The implementation must accomplish the following:

Set up opportunities so they are visible in Kanban views.

Ensure that the default view displays the opportunities in the sales cycle.

Ensure that users know how to change the status in the Kanban status view without opening the full record.

You need to complete the Kanban setup.

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

NOTE: Each correct selection is worth one point.

Hot Area:

Answer Area

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

Answer Area:

Answer Area

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

Section:

Explanation:

Reference:

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

QUESTION 77

DRAG DROP

You are a Dynamics 365 Sales consultant.

A customer asks you to create a main form for contacts. The form must include the following information:

account name and phone number

related opportunities

notes and activities

You need to configure the form.

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

NOTE: Each correct selection is worth one point.

Select and Place:

Answer Area

Options	Information type	Option
Sub-grid	Account name and phone number	<input type="text"/>
Timeline	Related opportunities	<input type="text"/>
Assistant	Notes and activities	<input type="text"/>
Quick View form		

Correct Answer:

Answer Area

Options	Information type	Option
<input type="checkbox"/>	Account name and phone number	Sub-grid
<input type="checkbox"/>	Related opportunities	Quick View form
<input checked="" type="checkbox"/> Assistant	Notes and activities	Timeline

Section:

Explanation:

Reference:

<https://docs.microsoft.com/en-us/powerapps/maker/model-driven-apps/quick-view-control-properties-legacy>

<https://docs.microsoft.com/en-us/powerapps/maker/model-driven-apps/set-up-timeline-control>

QUESTION 78

HOTSPOT

A company is implementing Dynamics 365 Sales.

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

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

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

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

You need to configure playbooks to meet the requirements.

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

NOTE: Each correct selection is worth one point.

Hot Area:

Answer Area

Requirement

Follow-up contact

Action

- Add an activity.
- Add a business rule.
- Add a playbook category.

Sales Manager checklist

- Add the document to the activity.
- Add the document as a quote template.
- Add the document to the business rule.

Answer Area:

Answer Area

Requirement	Action
Follow-up contact	<div style="border: 1px solid black; padding: 5px;"><p>Add an activity.</p><p>Add a business rule.</p><p>Add a playbook category.</p></div>
Sales Manager checklist	<div style="border: 1px solid black; padding: 5px;"><p>Add the document to the activity.</p><p>Add the document as a quote template.</p><p>Add the document to the business rule.</p></div>

Section:

Explanation:

Reference:

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

QUESTION 79

DRAG DROP

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.

Select and Place:

Actions

Answer Area

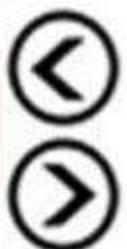
Add members.

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.



Correct Answer:

Actions

Change the name of SalesTerritoryA to SalesTerritoryB.



Answer Area

Replace the manager from SalesTerritoryA with another manager.

Create a new sales territory.

Associate the manager from SalesTerritoryA.

Add members.



Section:

Explanation:

Reference:

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

QUESTION 80

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

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

You use business process flows for all Dynamics 365 opportunities.

Some opportunities are closed before business process flow durations are calculated.

You need to ensure that business process flow duration values are calculated.

Solution: At any stage in the business process flow prior to the final stage, select Finish.

Does the solution meet the goal?

A. Yes

B. No

Correct Answer: A

Section:

Explanation:

Reference:

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

02 - Perform Configuration

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 metrics 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 client's 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

QUESTION 1

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

Correct Answer: D

Section:

QUESTION 2

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	<div style="border: 1px solid black; padding: 5px; width: fit-content; margin-left: auto; margin-right: auto;"><ul style="list-style-type: none">Create a Queue and Record Creation RuleCreate a Workflow for incoming emailsCreate an Action to trigger a plug-in</div>
Do not create contacts from emails from unknown senders	<div style="border: 1px solid black; padding: 5px; width: fit-content; margin-left: auto; margin-right: auto;"><ul style="list-style-type: none">Disable Create records for emails from unknown sendersEnable duplicate detection rules for emailsDisable duplicate detection rules for leadsEnable Create Lead in email tracking</div>

Answer Area:

Answer Area

Requirement	Action
Create leads from incoming emails	<ul style="list-style-type: none">Create a Queue and Record Creation RuleCreate a Workflow for incoming emailsCreate an Action to trigger a plug-in
Do not create contacts from emails from unknown senders	<ul style="list-style-type: none">Disable Create records for emails from unknown sendersEnable duplicate detection rules for emailsDisable duplicate detection rules for leadsEnable Create Lead in email tracking

Section:

Explanation:

Reference:

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

QUESTION 3

HOTSPOT

You need to configure territories and membership.

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

NOTE: Each correct selection is worth one point.

Hot Area:

Answer Area

Territories	Configuration
Number of territories to set up	<ul style="list-style-type: none">4567
Add Salesperson1 and Salesperson2	<ul style="list-style-type: none">Each salesperson should be added to a single territoryThey should be added to all territoriesA special territory should be created, and they should be added to it

Answer Area:

Answer Area

Territories	Configuration				
Number of territories to set up	<table border="1"><tr><td>4</td></tr><tr><td>5</td></tr><tr><td>6</td></tr><tr><td>7</td></tr></table>	4	5	6	7
4					
5					
6					
7					
Add Salesperson1 and Salesperson2	<table border="1"><tr><td>Each salesperson should be added to a single territory</td></tr><tr><td>They should be added to all territories</td></tr><tr><td>A special territory should be created, and they should be added to it</td></tr></table>	Each salesperson should be added to a single territory	They should be added to all territories	A special territory should be created, and they should be added to it	
Each salesperson should be added to a single territory					
They should be added to all territories					
A special territory should be created, and they should be added to it					

Section:

Explanation:

Reference:

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

QUESTION 4

HOTSPOT

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.

Hot Area:

Answer Area

Chart type	Type			
All leads by requirements in the last 30 days.	<table border="1"><tr><td>Dashboard</td></tr><tr><td>Views</td></tr><tr><td>Graphs</td></tr></table>	Dashboard	Views	Graphs
Dashboard				
Views				
Graphs				
Leads converted in the last 30 days.	<table border="1"><tr><td>Graph</td></tr><tr><td>Report</td></tr><tr><td>Export to Microsoft Excel</td></tr></table>	Graph	Report	Export to Microsoft Excel
Graph				
Report				
Export to Microsoft Excel				

Answer Area:

Answer Area

Chart type	Type
All leads by requirements in the last 30 days.	<ul style="list-style-type: none">DashboardViewsGraphs
Leads converted in the last 30 days.	<ul style="list-style-type: none">GraphReportExport to Microsoft Excel

Section:

Explanation:

QUESTION 5

HOTSPOT

You need to set up goals for the salespeople.

How should you set up the configurations? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

Answer Area

Configuration	Scope
Goal calculation	<ul style="list-style-type: none">SystemManual Recalculate as neededBusiness entity
Goal type	<ul style="list-style-type: none">ChildParentStretch

Answer Area:

Answer Area

Configuration	Scope			
Goal calculation	<table border="1"><tr><td>System</td></tr><tr><td>Manual Recalculate as needed</td></tr><tr><td>Business entity</td></tr></table>	System	Manual Recalculate as needed	Business entity
System				
Manual Recalculate as needed				
Business entity				
Goal type	<table border="1"><tr><td>Child</td></tr><tr><td>Parent</td></tr><tr><td>Stretch</td></tr></table>	Child	Parent	Stretch
Child				
Parent				
Stretch				

Section:**Explanation:****Reference:**

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

03 - Perform Configuration**Background**

Bellows College has several sports teams. Sporting events take place throughout the year. Processes for managing and selling tickets to events are very outdated. The college uses Microsoft Excel to track who has paid for each private box seat for each season. The college uses a paper-based system to manage individual ticket sales. Bellows often loses money on ticket sales due to lack of accurate purchasing information. The college currently does not support ticket sales on the day of a sporting event. All tickets must be purchased in advance.

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

Sales team

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

Dynamics 365

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

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

Enforce repeatable steps to promote and increase efficiency and consistency for ticket sales across all sports and venues. Calculate sales margins based on base ticket prices with discounts for group and alumni sales.

Maximize private box sales.

Provide visibility into all potential and pending sales.

Track and report follow up activities performed by all sales representatives.

Current processes**Ticket sales**

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

Ticket sales for existing customers will be entered as new opportunities for tracking and reporting purposes. To facilitate timely follow-up (and sales representative accountability), a phone call activity will be auto-generated every time a new opportunity is created.

Ticket sales for new customers will be entered in the solution as leads. Leads will have the following statuses: Open, Qualified, and Disqualified. Status values cannot be customized. Status values cannot be customized. Status reasons can be customized.

Ticket prices

The standard ticket price for all sporting events is \$50. Non-alumni ticket purchases are priced based on the standard rate. Alumni ticket purchases are priced at the current cost. This season the current cost is \$35 per ticket. All sports are priced on a markup, except for football. Football is priced based on a hard profit. The college has the following markup and margin policies for the three categories of ticket purchasers:

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

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

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

Private box seats

Because of the limited number of private box seats, private box seats sell out quickly. These seats are offered to current renters first, then alumni. Remaining box seat tickets are made available to others from year to year. The dean of the college has expressed the desire to personally call the CEOs or primary decision makers of groups to thank them for renewing their private box rentals.

Private box sales for existing customers will be entered as opportunities and converted to orders when finalized. Private box and group sales for new customers will be entered as leads and will follow a standardized sales process. To support reporting, pending new customer sales will go through a verification process using the stages New, Pending Approval, Approved.

Requirements

Accounting

Budgets and taxes must be tracked over an annual accounting period. The name of the accounting period must be displayed based upon the July 1 date. The accounting period must support abbreviations and must be divisible into four quarters.

Invoices must include:

Price List Products: Products tied to a price list

Non-catalog Products: Existing products not part of the product catalog

Opportunity Products: Products from a previously created opportunity

Product prices on the invoice can be changed at the salesperson's discretion

System configuration

The system must be set up as follows:

Individual cash and credit cards sales will be entered as orders in the system.

New opportunities will automatically generate a required phone call activity for the assigned sales representative to be completed within 5 days. Valid outcomes of the call will be set to Connected, Left Message, and Wrong Number when closed.

Non-renewals of private box rentals should be designated with the following outcomes for tracking and reporting purposes: Not interested, Budget cuts, No Longer in business, Other. If Other is chosen, the sales representative must provide additional information in the provided text box.

Tickets

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

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

Reporting

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

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

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

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

Problem statements

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

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

QUESTION 1

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.

Correct Answer: B

Section:

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).

QUESTION 2

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

Correct Answer: B

Section:

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>

QUESTION 3

HOTSPOT

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.

Hot Area:

Answer Area

Report type	Option
Orders	<ul style="list-style-type: none">SQL Server Reporting ServicesFetch-based Reporting Services
Discounts by Number of Employees	<ul style="list-style-type: none">SQL Server Reporting ServicesFetch-based Reporting Services

Answer Area:

Answer Area

Report type	Option
Orders	<ul style="list-style-type: none">SQL Server Reporting ServicesFetch-based Reporting Services
Discounts by Number of Employees	<ul style="list-style-type: none">SQL Server Reporting ServicesFetch-based Reporting Services

Section:

Explanation:

QUESTION 4

DRAG DROP

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.

Select and Place:

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

Correct Answer:

Options

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

Section:

Explanation:

Reference:

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

QUESTION 5

You need to implement dashboards.

Which URL should you use?

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

Correct Answer: A

Section:

Explanation:

Reference:

<https://carldesouza.com/install-power-bi-dynamics-365-content-pack/>

04 - Perform Configuration

Background

A company owns a group of theaters that stage live performances. Tickets to shows are sold by individual representatives by using a mobile app. Each theater has a manager. The managers rotate between theaters every six months.

The company plans to implement Dynamics 365 Sales.

Current environment

The company uses the following pricing structure for tickets:

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

Representatives create Microsoft Word documents to use as invoices. Pricing for tickets is often inconsistent. Ticket sales are often lost because customers go to other shows.

Requirements

Business cards

The business card of every group sales customer must be scanned and the image saved with the contact record. A customer's business card must be scanned even if the customer has been to the theatre before.

Business cards must show up on all contact forms.

Salespeople

Each salesperson needs to sell a certain amount of tickets per month.

The number of tickets each salesperson sells must be 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.

Opportunities

The name of the sales manager must be added to opportunity records when sales representatives close opportunities. Opportunities that are lost must include the reasons other show and not interested.

Some of the opportunities who order a large quantity of tickets every week want quotes quickly on various quantities. They want it broken down as follows:

- Price breakout by ticket
- Quantity discount amount
- Original ticket price

Orders

Customers who buy a large quantity of tickets to a show must always get a quote first.

Orders must always be created from the Quote record when it is a large purchase.

Customers who buy a smaller quantity of tickets that do not have quotes must have an invoice sent to them.

Data Analysis

Analyze email messages that pertain to ticket sales of the shows.

Analyze relationships to help with potential sales of friends and coworkers for potential ticket buyers. Analyze accounts and assess the account representative's relationship with the customer to gauge the level of communication.

Visuals

A Tickets dashboard for all cashiers must be created that contains the following bar charts:

all the tickets sold for each show

all the tickets available for each show

accounts that have purchased groups of 10 or more tickets

purchased tickets by age groups

Shows

Representatives must track which shows customers go to when they do not purchase the tickets to their shows. This information must be entered in the records. Every time a potential large sale is lost, the representative needs to ask the customer which show ticket was purchased instead of their show. Shows at other theatres must be updated on a monthly basis.

Quantity discounts and bulk purchase for different shows must be consistent

Issues

QUESTION 1

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

Correct Answer: D

Section:

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.

QUESTION 2

You need to determine the cause of the issue with desktop users and business cards.

What is the cause of the issue?

- A. The field needs to be added to the form
- B. Show image on the form is not selected in Form Properties
- C. The users do not have the appropriate permissions
- D. A business rule needs to be set up to show the field
- E. The AI Builder Business Card control needs to be configured for the field on the form

Correct Answer: B

Section:

QUESTION 3

HOTSPOT

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

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

NOTE: Each correct selection is worth one point.

Hot Area:

Answer Area

Scenario	Configuration				
Tickets dashboard	<table border="1"><tr><td>Permissions</td></tr><tr><td>View on dashboard</td></tr><tr><td>Dashboard type</td></tr><tr><td>Chart type</td></tr></table>	Permissions	View on dashboard	Dashboard type	Chart type
Permissions					
View on dashboard					
Dashboard type					
Chart type					
Age groups chart	<table border="1"><tr><td>Chart type</td></tr><tr><td>Dashboard type</td></tr><tr><td>Series</td></tr><tr><td>Field in view</td></tr></table>	Chart type	Dashboard type	Series	Field in view
Chart type					
Dashboard type					
Series					
Field in view					
Groups of tickets chart	<table border="1"><tr><td>Field to view</td></tr><tr><td>Dashboard type</td></tr><tr><td>Series</td></tr><tr><td>Chart type</td></tr></table>	Field to view	Dashboard type	Series	Chart type
Field to view					
Dashboard type					
Series					
Chart type					

Answer Area:

Answer Area

Scenario	Configuration				
Tickets dashboard	<table border="1"><tr><td>Permissions</td></tr><tr><td>View on dashboard</td></tr><tr><td>Dashboard type</td></tr><tr><td>Chart type</td></tr></table>	Permissions	View on dashboard	Dashboard type	Chart type
Permissions					
View on dashboard					
Dashboard type					
Chart type					
Age groups chart	<table border="1"><tr><td>Chart type</td></tr><tr><td>Dashboard type</td></tr><tr><td>Series</td></tr><tr><td>Field in view</td></tr></table>	Chart type	Dashboard type	Series	Field in view
Chart type					
Dashboard type					
Series					
Field in view					
Groups of tickets chart	<table border="1"><tr><td>Field to view</td></tr><tr><td>Dashboard type</td></tr><tr><td>Series</td></tr><tr><td>Chart type</td></tr></table>	Field to view	Dashboard type	Series	Chart type
Field to view					
Dashboard type					
Series					
Chart type					

Section:

Explanation:

QUESTION 4

DRAG DROP

You need to ensure that new managers receive the information they need.

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

NOTE: Each correct selection is worth one point.

Select and Place:

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

Answer Area	
Information	Action
Price lists	Action
Competitor list	Action

Correct Answer:

Actions
Create a playbook template
Add the security role to the manager's user ID

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

Section:

Explanation:

05 - Perform Configuration

Background

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

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

China

Germany

Mexico

United Kingdom (UK)

Current environment

Sales

Customers who have operations in more than one country are managed by the sales team within the country from which a request originated. However, it is difficult to get information about sales for these customers. Each salesperson manually creates customer quotes using Microsoft Word and Excel templates. This causes pricing inconsistencies, which is affecting profitability. Customers who have total sales over \$1,5M per year receive special Preferred Customer discount pricing on products and services. Costs, pricing, and product availability vary greatly by country.

Sales teams

Each office has a dedicated sales team. Sales are managed by a global team in countries without a sales office. Each sales team has a projected revenue target that is tied to the factory capacity in their country, except for the global team. The global team's projected revenue target is derived using a percentage of their actual sales from the previous year.

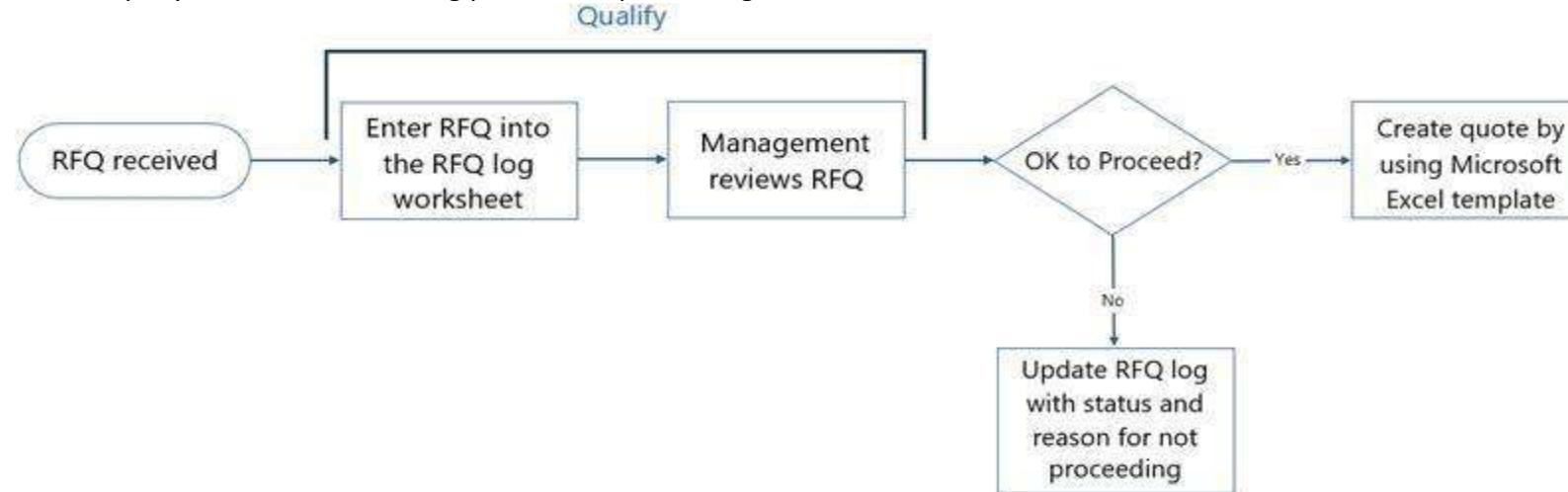
Each sales team maintains a spreadsheet in which they record customer requests for quotes (RFQs). The spreadsheets are stored on a network drive. Sales team revenue targets are set yearly based on

manufacturing capacities at each plant.

Individual sales targets are based on product lines by quarter.

Current RFQ process

The company defines the following process for processing RFQs:



Requirements

General setup

Standard functionality must be used when possible.

All open RFQs must be imported into the solution.

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

Country-specific sales information must be accessible only to sales representatives assigned to those teams. Sales and quote processes must be standardized across all sales divisions.

Sales territories must be set up for each country as well as for a global territory.

The global team will take over the management of RFQs for customers who have operations in more than one region. Due to regulatory considerations, the solution must be able to limit the kinds of products that can be sold by region.

RFQ management

New RFQs must be entered initially into the system as Leads until they are reviewed.

The default forecast categories must be used.

Standardized quote formats and product pricing must be enforced across all sales offices.

All tasks and follow-up activities with customers to close RFQs must be associated directly with the RFQs.

Credit and reference checks

All new customers must undergo credit and reference checks before estimates are created for any RFQs. This information will be recorded in a new custom field called Credit Check that has a Yes/No value. The finance manager must be assigned the credit and reference review when an RFQ is ready for review. If a customer's credit and reference review is unfavorable, the finance manager must follow up with the customer and the sales representative by phone.

The customer's credit report must be added to the RFQ as a permanent record and for audit purposes.

The solution must provide both a sample script that the finance manager can use as well as a checklist of how to perform the check.

Reporting

The sales manager dashboard must show the following data:

Projected revenue and profitability per country by month and fiscal year.

Projected and current product sales per country by month and fiscal year.

RFQ Won/Loss revenue comparison by fiscal quarter.

RFQ status by sales representative within their territory.

RFQs that are awaiting management approval and how long they have been waiting.

Sales lost to competitors month over month.

Managers must also be able to track how long an RFQ has been awaiting credit and reference checks, and how many RFQs have had unfavorable results from credit or reference checks.

Issues

PreferredCustomerA, who has factories in Germany, the UK, and Canada, reports that their sales representatives give different pricing and discounts to customers depending on the country in which the RFQ is initiated. Several RFQs that have passed management review but failed standard credit checks have been issued quotes. To prevent this, credit checks must now be done before the management approval meeting. Several imported RFQs contain quotes for discontinued products. Updated quotes with current product offers need to be sent to customers. CompanyB needs pricing for harnesses for their plants in Germany, the UK, and Argentina.

CompanyC received a quote for harnesses for their US home office. They need the products for their Canadian plant. CompanyD wants sales orders and shipments sent directly to VendorZ, who manufactures several subassemblies for them. VendorZ also builds components for other customers as well as for Contoso, Ltd. The chief financial officer (CFO) is concerned about the amount of work that the new credit and reference checks will create. Therefore, a

time-study needs to be initiated for that work to see whether an additional person needs to be hired.

QUESTION 1

You need to set up the required sales tracking for multinational customers.

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

Correct Answer: B, E

Section:

Explanation:

Reference:

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

QUESTION 2

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:

Answer Area

Chart requirement	Configuration
Type of chart	<ul style="list-style-type: none">ColumnPieFunnel
Horizontal Category Axis label	<ul style="list-style-type: none">Actual Close DateStatusCreated onEst. Close Date
Won data series value	<ul style="list-style-type: none">Actual RevenueEst. RevenuePredictive ScoreGoal target
Lost data series value	<ul style="list-style-type: none">Actual RevenueEst. RevenuePredictive ScoreGoal target

Answer Area:

Answer Area

Chart requirement	Configuration				
Type of chart	<table border="1"><tr><td>Column</td></tr><tr><td>Pie</td></tr><tr><td>Funnel</td></tr></table>	Column	Pie	Funnel	
Column					
Pie					
Funnel					
Horizontal Category Axis label	<table border="1"><tr><td>Actual Close Date</td></tr><tr><td>Status</td></tr><tr><td>Created on</td></tr><tr><td>Est. Close Date</td></tr></table>	Actual Close Date	Status	Created on	Est. Close Date
Actual Close Date					
Status					
Created on					
Est. Close Date					
Won data series value	<table border="1"><tr><td>Actual Revenue</td></tr><tr><td>Est. Revenue</td></tr><tr><td>Predictive Score</td></tr><tr><td>Goal target</td></tr></table>	Actual Revenue	Est. Revenue	Predictive Score	Goal target
Actual Revenue					
Est. Revenue					
Predictive Score					
Goal target					
Lost data series value	<table border="1"><tr><td>Actual Revenue</td></tr><tr><td>Est. Revenue</td></tr><tr><td>Predictive Score</td></tr><tr><td>Goal target</td></tr></table>	Actual Revenue	Est. Revenue	Predictive Score	Goal target
Actual Revenue					
Est. Revenue					
Predictive Score					
Goal target					

Section:**Explanation:****QUESTION 3**

HOTSPOT

You need to configure forecasting according to the requirements.

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

NOTE: Each correct selection is worth one point.

Hot Area:

Answer Area**Requirement****Action**

Include projected revenue by factory capacity.

Set the hierarchical entity to Territory.
Set the rollup entity to Product.
Set the goal metric to Revenue.
Set the hierarchical entity to Product.

Include current revenue targets.

Upload quota data for each territory.
Create a goal metric.
Create a goal target for revenue.
Upload a goal target from an Excel template.

Include both high confidence and won opportunities.

Create a calculated column and add it to the column layout.
Add the Committed and Won values to the column layout.
Create a rollup column and add it to the column layout.
Add a calculated value to the Opportunities Forecast view.

Answer Area:**Answer Area****Requirement****Action**

Include projected revenue by factory capacity.

Set the hierarchical entity to Territory.
Set the rollup entity to Product.
Set the goal metric to Revenue.
Set the hierarchical entity to Product.

Include current revenue targets.

Upload quota data for each territory.
Create a goal metric.
Create a goal target for revenue.
Upload a goal target from an Excel template.

Include both high confidence and won opportunities.

Create a calculated column and add it to the column layout.
Add the Committed and Won values to the column layout.
Create a rollup column and add it to the column layout.
Add a calculated value to the Opportunities Forecast view.

Section:

Explanation:

Reference:

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

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

QUESTION 4

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:

Answer Area

Requirement	Configuration
Verify that the credit and reference checks are completed for new customers.	<ul style="list-style-type: none">Data step and set as requiredStage with a branching ruleAction step
Require a sales manager review.	<ul style="list-style-type: none">Branching rule based on the management review stepBranching rule based on the lead qualification stepBranching rule based on the opportunity step
Track RFQ management approval.	<ul style="list-style-type: none">StageApproval flowBranch rule

Answer Area:

Answer Area**Requirement**

Verify that the credit and reference checks are completed for new customers.

Configuration

- 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

Section:**Explanation:****Reference:**

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

QUESTION 5**HOTSPOT**

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.

Hot Area:

Answer Area**Requirement**

Ensure that the finance manager performs the credit screening.

Configuration

Add a Task activity to the playbook.
Add the credit screening to the playbook.
Add the finance manager as the publisher of the playbook.
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.
Add a phone script to the playbook template.
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.
Associate the playbook with the Opportunity entity only.
Associate the playbook with the Lead and Opportunity entities.
Associate the playbook with the Quote entity.

Ensure proper tracking for all tasks associated with playbooks.

Set Track Progress to No.
Set Track Progress to Yes.
Set the estimated duration of the playbook template.
Set the estimated duration of the activity.

Answer Area:

Answer Area	Requirement	Configuration
	Ensure that the finance manager performs the credit screening.	<ul style="list-style-type: none"> Add a Task activity to the playbook. Add the credit screening to the playbook. Add the finance manager as the publisher of the playbook. 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.	<ul style="list-style-type: none"> Add the script to the phone call activity. Add a phone script to the playbook template. Add the phone script to the Task activity.
	Ensure that playbooks can be initiated from all RFQs.	<ul style="list-style-type: none"> Associate the playbook with the Lead entity only. Associate the playbook with the Opportunity entity only. Associate the playbook with the Lead and Opportunity entities. Associate the playbook with the Quote entity.
	Ensure proper tracking for all tasks associated with playbooks.	<ul style="list-style-type: none"> Set Track Progress to No. Set Track Progress to Yes. Set the estimated duration of the playbook template. Set the estimated duration of the activity.

Section:

Explanation:

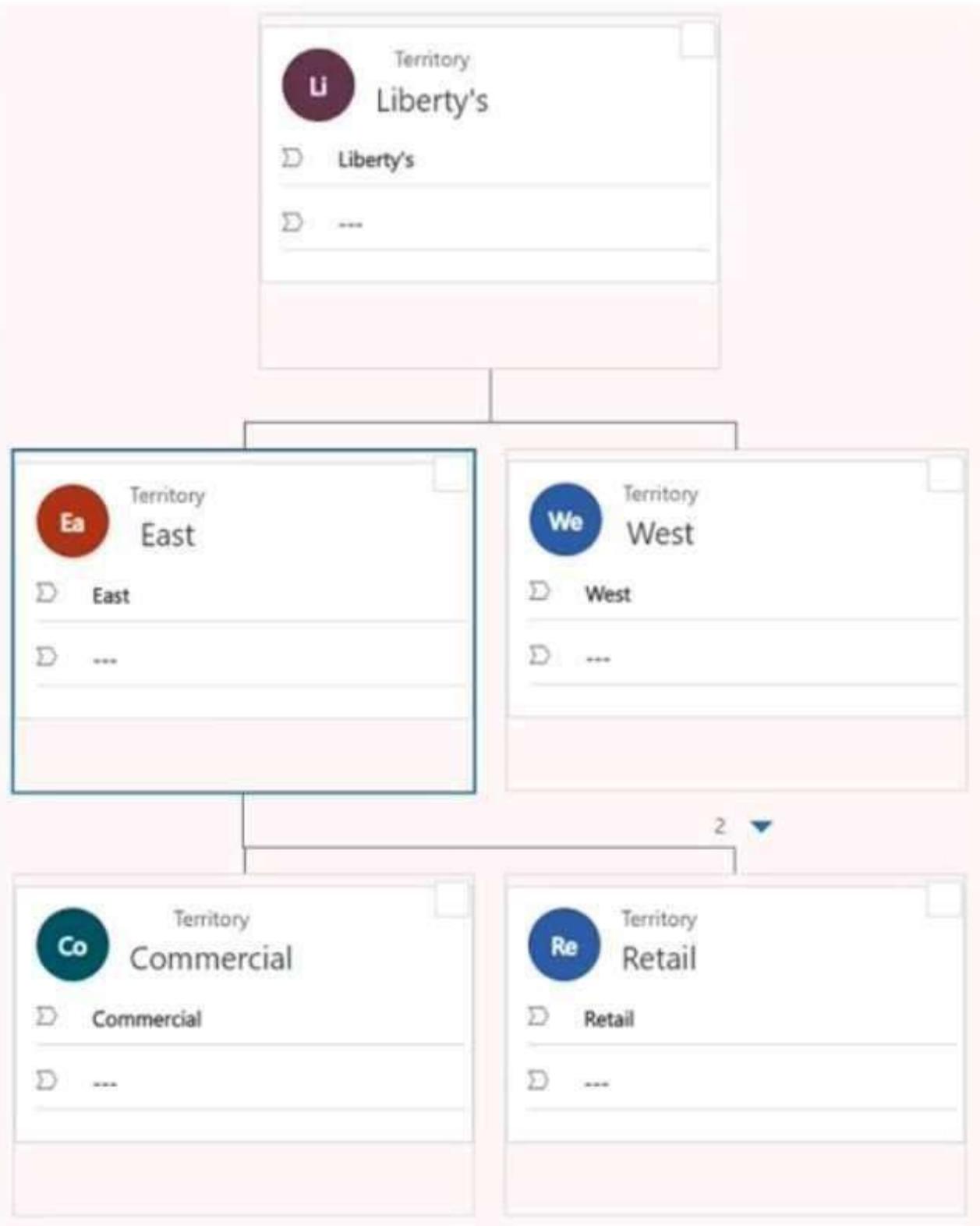
Reference:

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

06 - Perform Configuration

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

Employee©:

- Serves as an operations manager, responsible for managing orders and deliveries

General

• With the acquisition of the retail company, new bread types must be added. These bread types must apply to loaves and buns.

• A lead must be generated from an activity record.

• Liberty's wants to improve accuracy about Accounts and Contacts but does not want to track messages generated outside of the system.

• With the addition of the retail branch, Liberty's must create a forecasting model to estimate the revenue for the next quarter.

• If a phone call is received from a new potential customer, a lead must be generated from the activity record.

• Liberty's must automatically maintain current account and contact information.

• The system must be able to rate the health of an opportunity based on the following scale:

1 = Good

2 = Fair

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.

QUESTION 1

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

- Select Enable Dynamics 365 for mobile.
- Log out and log back in to view non-production apps.
- Select Apps from the non-production apps.
- Customize the mobile app to match the model-driven app.

Correct Answer: C

Section:

QUESTION 2

HOTSPOT

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.

Hot Area:

Answer Area

Scenario	Action
Set up the territory EmployeeA belongs to next month.	<ul style="list-style-type: none">Assign the Retail territory.Assign the East territory.Assign the West territory.Assign the Retail territory.Assign the Commercial territory.
Set up the default pricelist for opportunities for EmployeeB.	<ul style="list-style-type: none">Add EmployeeB as a member of the Retail territory; create a connection between the price list and territory.Add EmployeeB as a member of the Retail territory; create a connection between the price list and territory.Add EmployeeB as a member of the Retail territory; create a connection between salesperson and price list.Add EmployeeB as a member of the East territory; create a connection between the price list and territory.Add EmployeeB as a member of the East territory; create a connection between salesperson and price list.

Answer Area:

Answer Area

Scenario	Action
Set up the territory EmployeeA belongs to next month.	<ul style="list-style-type: none">Assign the Retail territory.Assign the East territory.Assign the West territory.Assign the Retail territory.Assign the Commercial territory.
Set up the default pricelist for opportunities for EmployeeB.	<ul style="list-style-type: none">Add EmployeeB as a member of the Retail territory; create a connection between the price list and territory.Add EmployeeB as a member of the Retail territory; create a connection between the price list and territory.Add EmployeeB as a member of the Retail territory; create a connection between salesperson and price list.Add EmployeeB as a member of the East territory; create a connection between the price list and territory.Add EmployeeB as a member of the East territory; create a connection between salesperson and price list.

Section:

Explanation:

QUESTION 3

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

- A. one price list item, one discount list
- B. one price list item, three discount lists

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

Correct Answer: B

Section:

QUESTION 4

HOTSPOT

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.

Hot Area:

Answer Area

Scenario	Action
Incorporate bread types from retail.	<ul style="list-style-type: none">Create a product family.Create a unit.Create a price list item.Create a product family.Create a product property.
An existing opportunity wants to change an order to one of the new bread types.	<ul style="list-style-type: none">Select the new bread type in the opportunity product.Update the price list.Modify and publish the product.Delete the opportunity product and readd the item.Select the new bread type in the opportunity product.

Answer Area:

Answer Area

Scenario	Action
Incorporate bread types from retail.	<div style="border: 1px solid #ccc; padding: 5px;">Create a product family. Create a unit. Create a price list item. Create a product family. Create a product property.</div>
An existing opportunity wants to change an order to one of the new bread types.	<div style="border: 1px solid #ccc; padding: 5px;">Select the new bread type in the opportunity product. Update the price list. Modify and publish the product. Delete the opportunity product and readd the item. Select the new bread type in the opportunity product.</div>

Section:**Explanation:****QUESTION 5**

You need to create a component for deliveries. What should you create?

- A. scheduled flow
- B. booking alert
- C. custom activity table
- D. business process flow

Correct Answer: A**Section:****QUESTION 6**

DRAG DROP

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.

Select and Place:

Actions	Answer Area
Create a manual flow.	
Use the Regarding field.	
Use the Convert To option.	
...	

Correct Answer:

Actions	Answer Area
...	
Activity type	Action
Phone call	Use the Regarding field.
Appointment	Create a manual flow.
Email	Use the Convert To option.

Section:

Explanation:

QUESTION 7

You need to resolve the issue reported by User1.

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

NOTE: Each correct selection is worth one point.

- A. Configure the connection graph.
- B. Configure LinkedIn Sales Navigator Lead lookup control.
- C. Create a tab for LinkedIn Sales Navigator and make it visible.
- D. install LinkedIn Sales Navigator and enable it.
- E. Enable CRM sync and activity writeback.

Correct Answer: A, B, E

Section:

QUESTION 8

DRAG DROP

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

Which three actions should you perform in sequence? To answer move the appropriate actions from the list of actions to the answer area and arrange them in the correct order. NOTE: More than one order of answer choices is correct. You will receive credit for any of the correct orders you select.

Select and Place:

Actions	Answer area
Delete the imported records from the Imports list.	1
Delete the import source file from the Imports list.	2
Run a duplicate detection job on Accounts.	3
Run a bulk delete job on duplicate Accounts.	
Reimport the file.	
Turn on the duplicate detection rule.	

Left side: Actions list with arrows for moving items between lists. Right side: Answer area with numbered boxes 1, 2, 3 and up/down arrows for reordering.

Correct Answer:

Actions	Answer area
Delete the imported records from the Imports list.	1 Run a bulk delete job on duplicate Accounts.
Delete the import source file from the Imports list.	2 Reimport the file.
Run a duplicate detection job on Accounts.	3 Turn on the duplicate detection rule.

Left side: Actions list with arrows for moving items between lists. Right side: Answer area with numbered boxes 1, 2, 3 and up/down arrows for reordering.

Section:

Explanation:

QUESTION 9

You need to optimize generated forecasts. What should you create?

- A. one predictive opportunity scoring model
- B. two predictive opportunity scoring models
- C. two predictive lead scoring models
- D. one predictive lead scoring model

Correct Answer: B

Section:

QUESTION 10

You need to resolve the missing credit card order.

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

NOTE: Each correct selection is worth one point.

- A. Create the order.
- B. Qualify a lead.
- C. Create a contact
- D. Convert the email.

Correct Answer: C, D

Section:

QUESTION 11

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

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

Correct Answer: C

Section:

QUESTION 12

DRAG DROP

You need to assign the appropriate out-of-the-box security roles.

Which roles should you assign? To answer, drag the appropriate roles to the correct users. Each role 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:

Roles

Role
Salesperson
Sales manager
Sales team member
Vice President of Sales

Answer Area

User

EmployeeB
EmployeeC
EmployeeA

Role

Correct Answer:

Roles	Answer Area
Vice President of Sales	

User	Role
EmployeeB	Sales team member
EmployeeC	Salesperson
EmployeeA	Sales manager

Section:

Explanation:

Exam G

QUESTION 1

A company uses Dynamics 365 Sales.

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

- 1 can - \$5.00
- 6 cans - \$28.00
- 1 case = \$100.00

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

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

Correct Answer: A

Section:

QUESTION 2

A company uses Dynamics 365 Sales. The company uses their organizational structure to determine how to aggregate forecasts for each year. The company divides a business unit into three separate units. Each unit will have a new manager.

You need to update the quotas for each user for the current fiscal year's forecast.

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

NOTE: Each correct selection is worth one point.

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

F. Assign the users to their new managers.

Correct Answer: B, F

Section:

QUESTION 3

A company uses Dynamics 365 Sales.

A sales manager wants a salesperson to send an email activity to a marketing list. The manager wants to track the successes and failures of the emails in one view. The salesperson must be limited to sending only this email activity to the marketing list. You need to recommend which feature the manager should use.

What should you recommend?

- A. quick campaign
- B. customer Journey
- C. campaign
- D. direct email

Correct Answer: A

Section:

QUESTION 4

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

- A. Change the business process flow that it is referencing.
- B. Retrain the model.
- C. Add a new model.
- D. Refresh the data.

Correct Answer: B

Section:

QUESTION 5

A company uses Dynamics 365 Sales.

You need to configure the Sales Insights sales accelerator.

What should you create?

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

Correct Answer: C

Section:

QUESTION 6

HOTSPOT

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.

Hot Area:

Answer Area

Requirement	Setup
Document management through Dynamics 365 Sales	Configure document management and SharePoint Online. Configure Exchange Online and SharePoint Online. Configure SharePoint Connector and SharePoint Online. Configure document management and SharePoint Online.
Access limited to salespeople	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 Area:

Answer Area

Requirement	Setup
Document management through Dynamics 365 Sales	Configure document management and SharePoint Online. Configure Exchange Online and SharePoint Online. Configure SharePoint Connector and SharePoint Online. Configure document management and SharePoint Online.
Access limited to salespeople	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.

Section:

Explanation:

QUESTION 7

DRAG DROP

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

You must configure the following process steps:

- Set up a meeting and notify the manager if a quote is sent for over a million dollars.
- Enable the salesperson to view LinkedIn customer profiles and manually add info to records without leaving the view.
- Ensure that the sequence is added to existing quotes.

You need to enforce this process.

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

Select and Place:

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

Correct Answer:

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

Section:

Explanation:

QUESTION 8

HOTSPOT

You are consulting for a company that is installing Microsoft Power BI to work with a Dynamics 365 Sales application. The administrator must configure each required option to successfully integrate the Sales Analytics template for use in Dynamics 365 Sales.

You need to identify which option to select.

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

NOTE: Each correct selection is worth one point.

Hot Area:

Answer Area	Configuration	Option
	Authentication method	<input type="radio"/> OAuth2 <input type="radio"/> Implicit <input checked="" type="radio"/> OAuth2 <input type="radio"/> Key
	Privacy level	<input type="radio"/> Organizational <input type="radio"/> Public <input checked="" type="radio"/> Organizational <input type="radio"/> Private

Answer Area:

Answer Area

Section:

Explanation:

QUESTION 9**HOTSPOT**

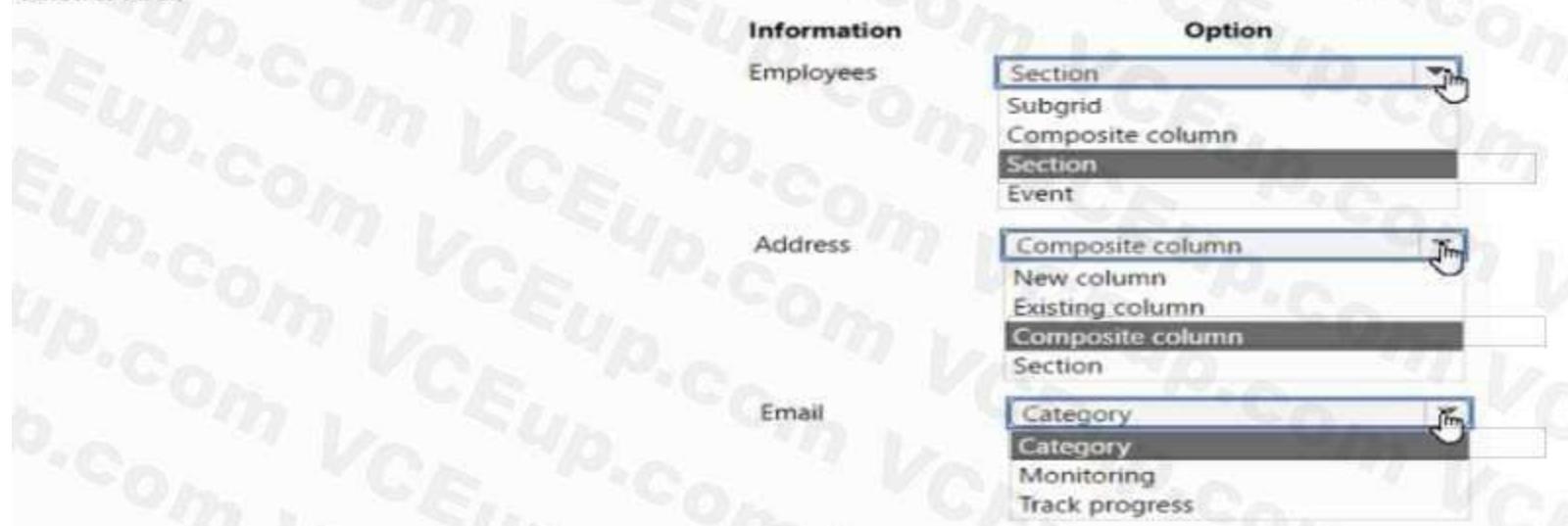
You are creating a new account form for Inside sales. The company name is in the account name field. Company employees are entered as contacts. The form must meet the following requirements with minimal additions:

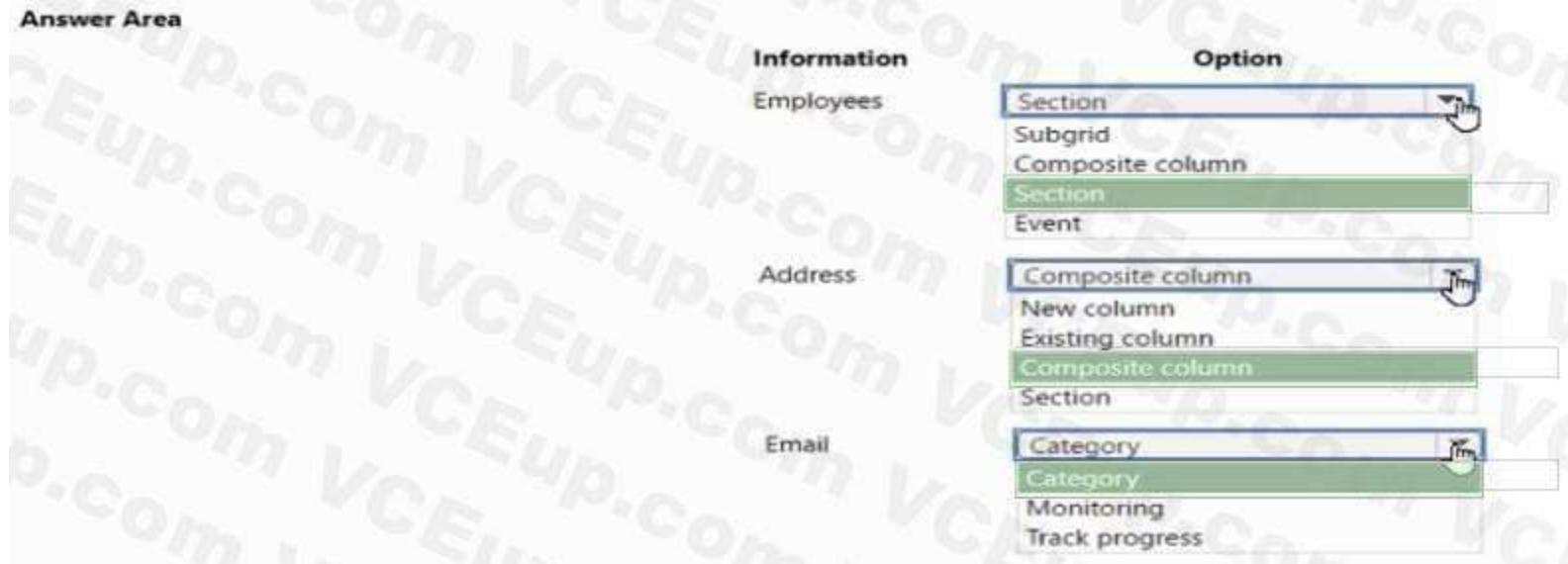
- List employee names.
- include the street address, city, and state as one field.
- Include columns to allow for entry of three separate email addresses.
- Ensure that users can only edit the phone number and email columns.

You need to configure the form.

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

NOTE: Each correct selection is worth one point.

Hot Area:**Answer Area****Answer Area:**



Section:

Explanation:

QUESTION 10

HOTSPOT

You are a Dynamics 365 Sales administrator. You set the fiscal year to begin in January.

A sales manager needs a monthly forecast for the next three years that starts in August of the next year. You need to configure the forecast using the fewest number of forecasts.

How should you configure each requirement? To answer, select the appropriate options in the answer area. NOTE: Each correct selection is worth one point.

Hot Area:

Answer Area

Requirement	Configuration
How many forecasts are needed?	1 1 3 4 5
What is the starting period for the forecast?	next year current year next year last year of the forecast last open year
How many periods are needed?	36 12 36 48 60

Answer Area:

Answer Area

Requirement	Configuration
How many forecasts are needed?	<input type="text" value="1"/> <input checked="" type="radio"/> 1 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5
What is the starting period for the forecast?	<input type="text" value="next year"/> <input checked="" type="radio"/> next year <input type="radio"/> current year <input type="radio"/> last year of the forecast <input type="radio"/> last open year
How many periods are needed?	<input type="text" value="36"/> <input checked="" type="radio"/> 36 <input type="radio"/> 12 <input checked="" type="radio"/> 36 <input type="radio"/> 48 <input type="radio"/> 60

Section:**Explanation:****QUESTION 11****HOTSPOT**

You are a Dynamics 365 Sales administrator for a medical office. The office provides a new service for doctors to consult with patients online on a first come, first served basis. Patients are created as Contacts.

Doctors can only view patient records for patients in their care.

The doctors need to see a graph of all interactions with each patient.

You need to create an entity to log online interactions.

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

NOTE: Each correct selection is worth one point.

Hot Area:**Answer Area**

Entity requirement	Configuration
Type	<input type="text" value="Custom activity"/> <input checked="" type="radio"/> Custom activity <input type="radio"/> Virtual entity <input type="radio"/> Custom entity
Ownership	<input type="text" value="User or team"/> <input checked="" type="radio"/> User or team <input type="radio"/> Organization <input type="radio"/> User or team

Answer Area:

Answer Area

Entity requirement	Configuration
Type	Custom activity Virtual entity Custom activity Custom entity
Ownership	User or team Organization User or team

Section:**Explanation:****QUESTION 12**

DRAG DROP

A company is evaluating Dynamics 365 Sales licenses. The sales manager wants the following features:

- knowledge management
- sequence designer
- predictive forecasting

You need to recommend sales plans that provide the full feature capabilities in the most costeffective manner. Which sales plans should you recommend? To answer, drag the appropriate sales plans to the correct features. Each sales plan may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.

Select and Place:

Sales plans	Answer Area	Sales plan
Dynamics 365 Sales Premium		
Dynamics 365 Sales Enterprise		
Dynamics 365 Sales Professional		

Feature
Knowledge management
Sequence designer
Predictive forecasting

Correct Answer:

Sales plans	Answer Area	Sales plan
Dynamics 365 Sales Premium		Dynamics 365 Sales Professional
Dynamics 365 Sales Enterprise		Dynamics 365 Sales Professional
Dynamics 365 Sales Professional		Dynamics 365 Sales Enterprise

Feature
Knowledge management
Sequence designer
Predictive forecasting

Section:**Explanation:**

QUESTION 13

DRAG DROP

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

- West territory: California to Texas
- East territory: Missouri to Maine

The sales territories should be configured as follows:

Territory	Manager	Salespeople
East	ManagerB	SalespersonC SalespersonD
West	ManagerA	SalespersonA SalespersonB

You need to set up the sales territories.

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

Select and Place:

Actions

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

Answer area

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Correct Answer:

Actions

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

Answer area

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▼

Section:**Explanation:****QUESTION 14**

DRAG DROP

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.

Select and Place:

Tools	Answer Area
<input type="checkbox"/> Timelines <input type="checkbox"/> Playbooks <input type="checkbox"/> Sequences	Scenario Create automated activities for quotes. Allow emails to be automatically generated. Allow wait times before generating the activity.
	Tool <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

Correct Answer:

Tools	Answer Area
<input type="checkbox"/> <input type="checkbox"/>	Scenario Create automated activities for quotes. Allow emails to be automatically generated. Allow wait times before generating the activity.
	Tool <input checked="" type="checkbox"/> Playbooks <input type="checkbox"/> Timelines <input type="checkbox"/> Sequences

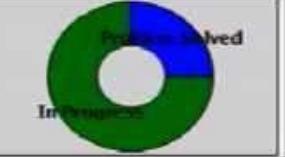
Section:

Explanation:

QUESTION 15

HOTSPOT

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

Account Overview as of: 11/13/2018		Status	Acct#
Fourth Coffee (sample)		Active	AB554G45
Basic Profile			
Parent Account: -			
Relationship:	-		
Industry:	-		
Location:	Renton, TX		
Category:	-		
Website:	http://www.fourthcoffee.com/		
Ownership:	-		
Ticker Symbol:	-		
Primary Contact			
Yvonne McKay (sample)		Active Opportunities	Amount Prob. Weighted
Title:	Purchasing Manager	Other	0
Location:	Redmond, WA	Total	0
Business Phone:	555-0100		
Mobile Phone:	-		
Home Phone:	-		
Fax:	-		
Pager:	-		
Email:	someone_a@example.com		
Additional Contacts			
Yvonne McKay (sample) - Purchasing Manager - (555-0100) 			
Opportunity Summary		Service Summary	
Active opportunities by probability All opportunities by current state No Data		Satisfaction (all closed cases) Status Reason (all cases) 	

Hot Area:

Answer Area

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

Answer Area:

Answer Area

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

Section:

Explanation:

QUESTION 16

A sales representative at a company uses Dynamics 365 Sa4es. The representative is assigned the Salesperson security role. The representative requires a list that has only full name, address, phone number, and opportunity amount. The system does not provide this setup by default. Other sales representatives must be able to display the same information and format when necessary.

You need to set up the system.

What should you create?

- A. personal view, and share it with the other representatives
- B. report that is sent to the team once a day
- C. system view
- D. system dashboard

Correct Answer: A

Section:

QUESTION 17

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.

Correct Answer: A

Section:

QUESTION 18

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

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

Correct Answer: D

Section:

QUESTION 19

A company has two departments. Each department uses only custom forms and views designed for each department. Currently, all users can view all forms and views. The company wants to improve usability for its users.

You need to limit users to only individual department forms and views.

What should you do?

- A. Create a site map for each department.
- B. Create a model-driven app for each department
- C. Use a hierarchy security model.
- D. Use security roles.

Correct Answer: D

Section:

QUESTION 20

HOTSPOT

A company enables sales accelerator in Microsoft Dynamics 365 Sales. All salespeople use a custom customer form. A salesperson observes that a work list displays TaskA instead of TaskB for a customer. The salesperson requires the following setup:

- Display only TaskB in the work list.
- View the task on the customer record as a visual cue.

You need to recommend changes to meet the requirements.

Hot Area:

Answer Area

Requirement	Action
Display only TaskB in the work list.	<input type="checkbox"/> Filter the work items. <input type="checkbox"/> Sort the work items. <input checked="" type="checkbox"/> Filter the work items. <input type="checkbox"/> Change the due date of TaskA to be before TaskB. <input type="checkbox"/> Change the due date of TaskB to be before TaskA.
View the task on the customer record.	<input type="checkbox"/> Add the Up next widget. <input checked="" type="checkbox"/> Add the Up next widget. <input type="checkbox"/> Add the Timeline control. <input type="checkbox"/> Add the assistant widget.

Answer Area:**Answer Area**

Requirement	Action
Display only TaskB in the work list.	<input type="checkbox"/> Filter the work items. <input type="checkbox"/> Sort the work items. <input checked="" type="checkbox"/> Filter the work items. <input type="checkbox"/> Change the due date of TaskA to be before TaskB. <input type="checkbox"/> Change the due date of TaskB to be before TaskA.
View the task on the customer record.	<input type="checkbox"/> Add the Up next widget. <input checked="" type="checkbox"/> Add the Up next widget. <input type="checkbox"/> Add the Timeline control. <input type="checkbox"/> Add the assistant widget.

Section:**Explanation:****QUESTION 21****HOTSPOT**

A sales manager creates personal views in Dynamics 365 Sales. The sales manager must allow the following:

- Assistants must be able to only add and remove columns from the personal view as needed.
 - Supervisors must be able to modify columns in the personal views when necessary and give direct reports access to the views. You need to assist the manager with setup.
- Which actions should the sales manager perform? To answer, select the appropriate options in the answer area. NOTE: Each correct selection is worth one point.

Hot Area:

Answer Area

Requirement	Action
Assistant needs	Share with read, write, and share permissions. Share with read, write permissions. Share with read, write, and share permissions. Share with read, export permissions, and send to users to import. Add to the solution and publish.
Supervisor needs	Add to the solution and publish. Share with read, write permissions. Share with read, write, and share permissions. Share with read, export permissions, and send to users to import. Add to the solution and publish.

Answer Area:**Answer Area**

Requirement	Action
Assistant needs	Share with read, write, and share permissions. Share with read, write permissions. Share with read, write, and share permissions. Share with read, export permissions, and send to users to import. Add to the solution and publish.
Supervisor needs	Add to the solution and publish. Share with read, write permissions. Share with read, write, and share permissions. Share with read, export permissions, and send to users to import. Add to the solution and publish.

Section:**Explanation:****QUESTION 22**

DRAG DROP

A company uses Dynamics 365 Sales with assignment rules. The assignment rules use a segment to filter the lead records. A sales manager wants to automatically add a series of tasks by using the same criteria as the assignment rules. You need to create the tasks and assign the tasks to the lead records.

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

Select and Place:

Actions

Add tasks to the sequence.

Activate the sequence.

Connect the existing segment to the sequence.

Create a sequence.

Answer area

1
2
3
4

**Correct Answer:****Actions**

Answer area

- 1 Connect the existing segment to the sequence.
2 Create a sequence.
3 Add tasks to the sequence.
4 Activate the sequence.

**Section:****Explanation:****QUESTION 23**

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

Correct Answer: D**Section:****QUESTION 24****HOTSPOT**

A company generates leads from a webform. Salespeople manage leads by country/region. All salespeople are part of the same Dynamics 365 Sales team. The sales manager requires the following functionality:

- Automate lead assignments.
- Ensure even lead distribution among salespeople.

You create a country/region attribute for the process. You must simplify the process. You plan to use segments when possible. You need to create a lead assignment rule for each country/region.

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

NOTE: Each correct selection is worth one point.

Hot Area:

Answer Area

Requirement

Filter leads for assignment.

Assign the country/region to the correct group.

Distribute leads to salespeople.

Configuration

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

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

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

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

Assign the country/region to specific teams.

Assign the country/region to any seller.

Assign the country/region to specific teams.

Assign the country/region to specific sellers.

Assign the country/region to sellers with matching attributes.

Use load balancing.

Use load balancing.

Use round-robin distribution.

Answer Area:

Answer Area

Requirement

Filter leads for assignment.

Assign the country/region to the correct group.

Distribute leads to salespeople.

Configuration

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

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

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

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

Assign the country/region to specific teams.

Assign the country/region to any seller.

Assign the country/region to specific teams.

Assign the country/region to specific sellers.

Assign the country/region to sellers with matching attributes.

Use load balancing.

Use load balancing.

Use round-robin distribution.

Section:

Explanation:

QUESTION 25

A company is evaluating Dynamics 365 Sales to replace an existing customer relationship management (CRM). An IT manager observes that the company requires 20 custom tables. The company wants the most cost-effective solution. You need to recommend a license type to the company.

What should you recommend?

- A. Sales Professional
- B. Sales Enterprise
- C. Microsoft Relationship Sales
- D. Sales Premium

Correct Answer: B

Section:

QUESTION 26

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. PCF control
- B. Business rule
- C. Custom control
- D. JavaScript

Correct Answer: C

Section:

QUESTION 27

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

Correct Answer: B, D

Section:

QUESTION 28

DRAG DROP

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.

Select and Place:

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.	




Correct Answer:

Actions	Answer area
Set up email activities so they do not close.	
Set up email activities to close.	
	




Section:

Explanation:

QUESTION 29

DRAG DROP

You are implementing Dynamics 365 Sales for a company.

The company wants to use features that do the following:

- Provide a salesperson with up-to-date information on email, meetings, and more in Dynamics 365.
- Retrieve information from emails about customers in Microsoft Dataverse without manual data entry.
- Track read receipts to customers in Dataverse.

You need to configure the correct component.

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

NOTE Each correct selection is worth one point.

Select and Place:

Components	Answer Area
Assistant	
Auto capture	
Email engagement	
Relation analytics	

Requirement

Provide a salesperson with up-to-date information on email, meetings, and more in Dynamics 365.

Retrieve information from emails about customers in Dataverse without manual data entry.

Track read receipts to customers in Dataverse.

Correct Answer:

Components	Answer Area
Relation analytics	

Requirement

Provide a salesperson with up-to-date information on email, meetings, and more in Dynamics 365.

Retrieve information from emails about customers in Dataverse without manual data entry.

Track read receipts to customers in Dataverse.

Section:

Explanation:

QUESTION 30

DRAG DROP

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.

Select and Place:

Features	Answer Area
<input type="checkbox"/> Unit group	
<input type="checkbox"/> Discount list	
<input type="checkbox"/> Product family	
<input type="checkbox"/> Product bundle	

Requirement	Feature
Free mug with purchases of single can of soda	<input type="checkbox"/>
Adjusted price for purchase of 12 cases of soda	<input type="checkbox"/>
Price based on six-pack of soda	<input type="checkbox"/>

Correct Answer:

Features	Answer Area
<input type="checkbox"/> Product family	
<input type="checkbox"/> Product bundle	
<input type="checkbox"/> Discount list	
<input type="checkbox"/> Unit group	

Section:

Explanation:

QUESTION 31

HOTSPOT

A company uses Microsoft 365 and Dynamics 365 Sales. The company sets up server-side synchronization in preparation for mailbox configuration. A new business manager must be able to approve mailboxes for users.

You need to assign roles to the business manager by using the principle of least privilege.

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

NOTE: Each correct selection is worth one point.

Hot Area:

Answer Area

Product	Role
Microsoft 365	Exchange Administrator Global Administrator Exchange Administrator Dynamics 365 Service Administrator
Dynamics 365 Sales	System Customizer System Customizer Environment Maker System Administrator Dynamics 365 App for Outlook User

Answer Area:**Answer Area**

Product	Role
Microsoft 365	Exchange Administrator Global Administrator Exchange Administrator Dynamics 365 Service Administrator
Dynamics 365 Sales	System Customizer System Customizer Environment Maker System Administrator Dynamics 365 App for Outlook User

Section:**Explanation:****QUESTION 32****HOTSPOT**

A company implements the Microsoft Relationship Sales Solution.

You need to configure synchronization settings.

What should you configure?

To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

Answer Area

Records to synchronize	Synchronization attribute
Dynamics 365 Sales records to Sales Navigator	Accounts and Leads Contacts and Leads Accounts and Leads Accounts and Contacts InMails, messages, and notes InMails, posts, and news Messages, notes, and news Messages, posts, and notes InMails, messages, and notes
Sales Navigator records to Dynamics 365 Sales	

Answer Area:

Answer Area

Records to synchronize	Synchronization attribute
Dynamics 365 Sales records to Sales Navigator	Accounts and Leads Contacts and Leads Accounts and Leads Accounts and Contacts InMails, messages, and notes InMails, posts, and news Messages, notes, and news Messages, posts, and notes InMails, messages, and notes
Sales Navigator records to Dynamics 365 Sales	

Section:

Explanation:

QUESTION 33

A company uses Dynamics 365 Sales. You have administrator privileges. The sales manager plans to require the sales team to track emails from Microsoft Outlook. You need to direct users to where they can deploy their own App for Outlook instance. To where should you direct them?

- A. Dynamics 365 App for Outlook area
- B. Microsoft AppSource
- C. Email settings
- D. Advanced settings

Correct Answer: A

Section:

QUESTION 34

A company uses Dynamics 365 Sales.
You need to implement the Microsoft Relationship Sales solution.
Which add-on should you install?

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

Correct Answer: D

Section:

QUESTION 35

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

Correct Answer: B

Section:

QUESTION 36

DRAG DROP

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.

Select and Place:

Views	Answer Area	Scenario	View
JavaScript		Show Type	
column component		Show Product	
form control		Show Other Product	
business rule			

Correct Answer:

Views	Answer Area	Scenario	View
JavaScript		Show Type	form control
		Show Product	column component
		Show Other Product	business rule

Section:

Explanation:

QUESTION 37

DRAG DROP

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.

Select and Place:

Fields	Answer Area					
Requirement	Field					
Actual Value and Actual Close Date					Closed opportunities	
Estimated Value and Estimated Close Date						
Actual Value, Actual Close Date, Estimated Value, and Estimated Close Date					Open opportunities	

Correct Answer:

Fields	Answer Area	
Actual Value and Actual Close Date		

Section:

Explanation:

QUESTION 38

HOTSPOT

A store sells toys to companies and individual consumers.

You need to track the following relationships by using out-of-the-box functionality:

- For individual consumers, log information about parents and their children. If a record for a parent is deleted, the record for the child must also be deleted.
 - For companies that are subsidiaries, the store records their relationship to a corporate office. You must display the information in a hierarchical view. What should you do to create each relationship? To answer, select the appropriate options in the answer area NOTE: Each correct selection is worth one point.

Hot Area:

Answer Area

Required association	Action
Corporate office to a subsidiary	<ul style="list-style-type: none">Create a parental relationship.Add a child account.Add a parent account.Create a parental relationship.Create a referential relationship.
Individuals to companies	<ul style="list-style-type: none">Add multiple accounts to a contact.Add multiple contacts to a contact.Add multiple accounts to a contact.Add multiple contacts to an account.Add multiple accounts to an account.
Parents to their children	<ul style="list-style-type: none">Create a referential relationship.Add a child contact.Add a parent contact.Create a parental relationship.Create a referential relationship.

Answer Area:

Answer Area

Required association	Action
Corporate office to a subsidiary	<div style="border: 1px solid #ccc; padding: 5px; width: fit-content; margin-left: auto; margin-right: 0;">Create a parental relationship. Add a child account. Add a parent account. Create a parental relationship. Create a referential relationship.</div>
Individuals to companies	<div style="border: 1px solid #ccc; padding: 5px; width: fit-content; margin-left: auto; margin-right: 0;">Add multiple accounts to a contact. Add multiple contacts to a contact. Add multiple accounts to a contact. Add multiple contacts to an account. Add multiple accounts to an account.</div>
Parents to their children	<div style="border: 1px solid #ccc; padding: 5px; width: fit-content; margin-left: auto; margin-right: 0;">Create a referential relationship. Add a child contact. Add a parent contact. Create a parental relationship. Create a referential relationship.</div>

Section:**Explanation:****QUESTION 39**

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

Correct Answer: D**Section:****QUESTION 40**

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. Top of hierarchy

- C. Hierarchy entity
- D. Rollup entity

Correct Answer: C

Section:

QUESTION 41

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. Talking points
- C. Communication frequency
- D. Conversation intelligence

Correct Answer: C

Section:

QUESTION 42

A company that sells products in multiple regions uses Dynamics 365 Sales.

The company has different product offerings in each region.

The system must be set up to send the latest product information to each region every month.

You need to set up the distribution of product information for the regions.

What should you set up?

- A. guided selling
- B. territories
- C. relationship intelligence
- D. dynamic marketing lists

Correct Answer: D

Section:

QUESTION 43

DRAG DROP

A company uses Dynamics 365 Sales. The company uses the accounts, contacts, leads, and opportunities tables and five custom tables. The company has three roles: manager, administrator, and frontline worker.

The sales manager requires the most cost-effective licensing option for each level of user. The user requirements are as follows:

	Accounts table	Contacts table	Leads table	Opportunities table	Custom tables
Manager role	Read and update	Read and update	Read	Read	Read
Administrator role	Create, read, and update				
Front-line worker role	Create and update activities				

You need to assign the licenses.

Which licenses should you assign? To answer, drag the appropriate licenses to the correct roles. Each license 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:

Licenses	Answer Area
Team Members	
Dynamics 365 Sales Premium	
Dynamics 365 Sales Enterprise	
Dynamics 365 Sales Professional	

Role	License
Managers	
Administrators	
Front-line workers	

Correct Answer:

Licenses	Answer Area
Dynamics 365 Sales Premium	

Role	License
Managers	Dynamics 365 Sales Enterprise
Administrators	Dynamics 365 Sales Professional
Front-line workers	Team Members

Section:

Explanation:

QUESTION 44

A company uses Dynamics 365 Sales.

The sales manager wants leads to automatically route to the salesperson who has the fewest leads.

You need to automate the process.

What should you set up?

- A. assignment rule

- B. assistant
- C. sequence
- D. playbook
- E. business process flow

Correct Answer: A

Section:

QUESTION 45

A company uses Dynamics 365 Sales.

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

You need to simplify data entry for the sales representatives.

What should you do?

- A. Remove unnecessary columns from the view.
- B. Create a Microsoft Power BI dashboard that contains only the relevant information.
- C. Remove unnecessary columns from the form.
- D. Edit the site map so only the main form is available.

Correct Answer: C

Section:

QUESTION 46

You need to help the new salesperson resolve the access issue.

What should you change?

- A. Salesperson role to a Sales Manager role
- B. Team member license to a Dynamics 365 Sales Enterprise license
- C. Dynamics 365 Sales Enterprise license to a Dynamics 365 Sales Premium license
- D. Sales Team Member role to a Salesperson role

Correct Answer: B

Section:

QUESTION 47

HOTSPOT

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.

Hot Area:

Answer Area**Requirement**

Add required functionality to the system.

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 Area:**Answer Area****Requirement**

Add required functionality to the system.

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.

Section:**Explanation:****QUESTION 48**

You need to recommend to the sales manager which license to use for salespeople who work on tradeshow leads.
What should you recommend?

- A. Dynamics 365 Sales Premium
- B. Dynamics 365 Team member
- C. Dynamics 365 Sales Enterprise
- D. Dynamics 365 Sales Professional**

Correct Answer: D**Section:****QUESTION 49**

You need to help the salespeople track their emails.
Which three actions should you perform? Each correct answer presents part of the solution.
NOTE: Each correct selection is worth one point.

- A. Enable server-side synchronization.
- B. Add the Dynamics 365 App for Outlook security role to the user.**

- C. Enable email engagement.
- D. Turn on auto capture.
- E. Add the Dynamics 365 App for Outlook to the salesperson.
- F. Approve the salesperson's email address.

Correct Answer: C, D, E

Section:

QUESTION 50

HOTSPOT

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.

Hot Area:

Answer Area

Requirement	Action
Streamline lead distribution.	<input type="checkbox"/> Implement assignment rules. <input type="checkbox"/> Assign the leads. <input type="checkbox"/> Add business rules. <input checked="" type="checkbox"/> Implement assignment rules. <input type="checkbox"/> Configure business process flows.
Set the lead distribution type.	<input type="checkbox"/> Select load balancing. <input type="checkbox"/> Select round robin. <input checked="" type="checkbox"/> Select load balancing.

Answer Area:

Answer Area

Requirement	Action
Streamline lead distribution.	<input type="checkbox"/> Implement assignment rules. <input type="checkbox"/> Assign the leads. <input type="checkbox"/> Add business rules. <input checked="" type="checkbox"/> Implement assignment rules. <input type="checkbox"/> Configure business process flows.
Set the lead distribution type.	<input type="checkbox"/> Select load balancing. <input type="checkbox"/> Select round robin. <input checked="" type="checkbox"/> Select load balancing.

Section:

Explanation:

QUESTION 51

You need to send a notification to contacts for the pop-up sale.

What should you create?

- A. campaign
- B. quick campaign
- C. marketing email
- D. customer journey

Correct Answer: A

Section:

QUESTION 52

HOTSPOT

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.

Hot Area:

Answer Area

Issue	Resolution
The stakeholder does not appear in the subgrid.	<ul style="list-style-type: none">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.
The price does not calculate.	<ul style="list-style-type: none">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.

Answer Area:**Answer Area**

Issue	Resolution
The stakeholder does not appear in the subgrid.	<ul style="list-style-type: none">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.
The price does not calculate.	<ul style="list-style-type: none">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.

Section:

Explanation: