

**Certification Provider: Microsoft**

**Exam Code: MB-210**

**Exam Name: Microsoft Dynamics 365 Sales Functional Consultant**

**Collated By: Million Zhang**

**Collated Date: 29<sup>th</sup> Aug 2023**

**Number of Question:**

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# Case Study 1 - Humongous Insurance

## Introductory Info

### Background -

Humongous Insurance provides fleet automotive insurance. The company's accounting year is July 1<sup>st</sup> - June 31<sup>st</sup>.

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 1<sup>st</sup>.

### 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 clients' currency.

Quotes and invoices must be able to be viewed across a variety of devices.

Pricing must be standardized for insurance products while supporting tiered pricing across national and regional accounts.

#### Opportunities -

Closed opportunities that are won or lost must capture competitor information. The company wants a visualization built for the categories related to why the opportunities closed a certain way.

When an opportunity is nearing time to quote, products should be added to the opportunity.

**Other requirements -**

Simplify data entry and reduce dual data entry.

Help salespeople and their managers keep track of where they are in the sales process.

Use out-of-the-box reports where possible.

Generate invoice numbers automatically.

Begin invoice numbers with the letters INV.

Allow managers to be able to view a diagram and drill down to leads converted in the last 30 days.

**Issues -**

Salespeople cannot identify the sales process stage process for each customer.

Updated products are not easily updated within the product groups.

There is no pricing tool.

Salespeople must research each product every time they have to quote a customer on a product.

UserA is unable to qualify leads.

The manager follows the process on an approved quote but an error occurs.

ClientA purchases products from multiple regions for a single order.

Not all products are available in regional pricelists or national pricelists.

# Question 1

HOTSPOT -

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

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

NOTE: Each correct selection is worth one point.

Hot Area:

## Answer Area

Requirement	Action
Create leads from incoming emails	<div style="border: 1px solid black; padding: 5px;"><input type="checkbox"/> Create a Queue and Record Creation Rule <input type="checkbox"/> Create a Workflow for incoming emails <input type="checkbox"/> Create 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;"><input type="checkbox"/> Disable Create records for emails from unknown senders <input type="checkbox"/> Enable duplicate detection rules for emails <input type="checkbox"/> Disable duplicate detection rules for leads <input type="checkbox"/> Enable Create Lead in email tracking</div>

Answer:

## Answer Area

Requirement	Action
Create leads from incoming emails	<div style="border: 1px solid black; padding: 5px; background-color: #e0f2e0;"><input checked="" type="checkbox"/> Create a Queue and Record Creation Rule <input type="checkbox"/> Create a Workflow for incoming emails <input type="checkbox"/> Create 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; background-color: #e0f2e0;"><input checked="" type="checkbox"/> Disable Create records for emails from unknown senders <input type="checkbox"/> Enable duplicate detection rules for emails <input type="checkbox"/> Disable duplicate detection rules for leads <input type="checkbox"/> Enable Create Lead in email tracking</div>

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

<https://docs.microsoft.com/en-us/dynamics365/customer-service/set-up-rules-to-automatically-create-or-update-records#how-do-record-creation-and-update-rules-work-with-queues>

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

- ✉  **WASSIM2020**  2 years, 7 months ago  
Correct ! (Verified)  
   upvoted 11 times
- ✉  **mrejay**  1 year, 7 months ago  
Correct  
   upvoted 1 times
- ✉  **yp** 2 years, 6 months ago  
1:  
<https://docs.microsoft.com/en-us/dynamics365/customer-service/set-up-rules-to-automatically-create-or-update-records#how-do-record-creation-and-update-rules-work-with-queues> ;  
2:  
<https://docs.microsoft.com/en-us/dynamics365/customer-service/set-up-rules-to-automatically-create-or-update-records#set-email-conditions>  
   upvoted 4 times
- ✉  **HassanSarhan** 2 years, 1 month ago  
Thanks!  
   upvoted 1 times

## Question 2

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	<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					

Answer:

### 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					
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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					

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

  **mekoye7752**  2 years, 6 months ago

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

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

more than 5 territories ...

   upvoted 8 times

  **ramberry** 1 year, 1 month ago

The 5 territories of the US is the current environment. The two other locations Canada and United Kingdom will be other environments. I think 5 is correct based on this logic

   upvoted 2 times

- ✉  **ducavalllo**  2 years, 7 months ago  
correct!  
<https://docs.microsoft.com/en-us/power-platform/admin/set-up-sales-territories-organize-business-markets-geographical-area>  
You can't allocate the same user to multiple territories. If you need to assign a user to a larger area (more than one existing territory), create a new territory that includes the existing territories, and then assign the user to that new territory.  
   upvoted 7 times
- ✉  **ad3791** 2 years, 2 months ago  
Doesn't that mean it's not correct then? Your explanation for allocating users to multiple territories means that they shouldn't be added to individual territories.  
   upvoted 4 times
- ✉  **HassanSarhan** 2 years, 1 month ago  
thank you that's right  
   upvoted 1 times
- ✉  **OTRXIXON**  11 months, 3 weeks ago  
It is more of an English test "Salesperson1 and Salesperson2 are part of the south region and the national account, respectively." So Salesperson 1 South Region and Sales Person2 to the national account.  
   upvoted 3 times
- ✉  **Candy2002** 10 months, 2 weeks ago  
Yes, what a respectively in the end...  
   upvoted 1 times
- ✉  **prepare4exam** 1 year, 1 month ago  
"Each territory must be set up as a business unit." You can only assign a user to one business unit. So we have to create a parental unit. In my opinion 6 is the right answer.  
   upvoted 1 times
- ✉  **ceejaybee** 1 year, 2 months ago  
Scenario is badly worded. Is National territory actually one and the same as Parent Territory of US, so only 4 sub-territories under US parent? All the other parts of the scenario, e.g security setup, seem to bear this out. And why even mention Canada and UK if they are not going to be counted as territories. 5, 6, 7, who knows (sigh)  
   upvoted 1 times
- ✉  **Sabineka** 1 year, 8 months ago  
if this is the current environment then we should have 6 territories : USA and 5 sub-territories. right?  
   upvoted 1 times
- ✉  **bolza** 2 years, 4 months ago  
doesn't it have to be 7 territories for nort, south, east, west and national in the USA and additionally Canada and UK? And the second question has to be a new territory to allocate the salespeopple to south and national (which will be together in a new territory)  
   upvoted 5 times
- ✉  **ceejaybee** 1 year, 2 months ago  
Second question "Salesperson1 and Salesperson2 are part of the south region and the national account, respectively". Respectively, so SP1 is South, SP2 is National  
   upvoted 1 times
- ✉  **RavinBrissy** 2 years, 6 months ago  
The question discussed about current environment. Therefore number of territories must be 5.  
   upvoted 6 times
- ✉  **SeekerShan** 2 years, 6 months ago  
Why not 7 territories?  
   upvoted 6 times

Bing: 5

According to the information you provided, there are five territories in the United States: north, east, south, west, and national. Each territory must be set up as a Business Unit for security and have the ability to qualify its own leads. So, the number of territories that should be set up is five. Is there anything else you would like to know? 😊

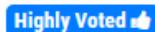
## Question 3

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

What should you configure?

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

Answer: D

✉️  **WASSIM2020**  2 years, 7 months ago

Correct!

   upvoted 6 times

✉️  **Spice\_87**  2 years, 3 months ago

correct

   upvoted 3 times

Bing:

To ensure that sales numbers reflect the accounting calendar, you should configure the **Fiscal Year Settings**. This will allow you to set up the company's accounting year, which is from July 1st to June 31st, and ensure that sales numbers are reported according to this calendar. The correct answer is **D. Fiscal Year Settings**. Is there anything else you would like to know? 😊

## 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.	Dashboard Views Graphs
Leads converted in the last 30 days.	Graph Report Export to Microsoft Excel

Answer:

### Answer Area

Chart type	Type
All leads by requirements in the last 30 days.	Dashboard Views Graphs
Leads converted in the last 30 days.	Graph Report Export to Microsoft Excel

第二个争议大点，看着好像选 Graph 的多点

✉  **JudT** 2 months, 1 week ago

- 1- Dashboard: To view and drill down
- 2 - Graph: Just for visualization NOT drill down

   upvoted 1 times

✉  **CDubz** 2 months, 2 weeks ago

I would say Dashboard and Graph...the question states "create VISUALISATIONS for Managers"...no?

   upvoted 1 times

✉  **AAR75** 1 year, 3 months ago

it states that "You need to create visualizations for managers", so answer should be Graph for both

   upvoted 1 times

✉  **mrejay** 1 year, 6 months ago

DashBoard

Chart

   upvoted 1 times

- ✉  **moodi86** 1 year, 7 months ago  
I would say Graph fro both, Dashboard only is vague answer  
   upvoted 1 times
- ✉  **loulou2105** 1 year, 8 months ago  
The second question should be a "chart" as a diagram is needed  
   upvoted 1 times
- ✉  **loulou2105** 1 year, 8 months ago  
"Graph"  
   upvoted 2 times
- ✉  **ChandanKC** 1 year, 9 months ago  
Please can someone explain why dashboard and report has been selected as answer?  
   upvoted 2 times
- ✉  **JoeS007** 1 year, 8 months ago  
In the requirements it states "Allow managers to be able to view a diagram and drill down to leads converted in the last 30 days." You would do this with a dashboard.  
   upvoted 5 times
- ✉  **JudT** 2 months, 1 week ago  
Correct  
   upvoted 1 times

## 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	<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				

Answer:

### 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				

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

✉️  **SashM** 1 year, 4 months ago

correct.

   upvoted 2 times

✉️  **loulou2105** 1 year, 8 months ago

Correct

   upvoted 2 times

## Question 6

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

Which fields are required?

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

Answer: C

-  **Veektoreeous** Highly Voted  2 years, 4 months ago  
Status Reason and Competitor  
   upvoted 11 times
-  **Cyriharsh** Most Recent  2 years, 1 month ago  
CORRECT!!!  
   upvoted 4 times
-  **Dean0918** 2 years, 5 months ago  
Answer is correct.  
   upvoted 4 times
-  **WASSIM2020** 2 years, 7 months ago  
Incorrect!  
the correct answer is A, required fields are status and stackholders  
   upvoted 2 times
-  **avow** 2 years, 6 months ago  
How is that so when the scenario itself states "Closed opportunities that are won or lost must capture competitor information."  
   upvoted 8 times
-  **WASSIM2020** 2 years, 6 months ago  
Oh yes you have a reason, i forget this sentence  
   upvoted 2 times

Bing:

Based on the information provided, when opportunities are marked as lost, the required fields are **Status Reason** and **Competitor**. So the correct answer is **C. Status Reason and Competitor**. Is there anything else you would like to know? 😊

## Question 7

HOTSPOT -

You need to set up quotes to meet the requirements.

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

NOTE: Each correct selection is worth one point.

Hot Area:

### Answer Area

Requirement	Configuration
Send quotes in a read-only format	<ul style="list-style-type: none"><li>▼</li><li>Use PDF</li><li>Use XML</li><li>Use RTF</li><li>Use CSV</li></ul>
Create a standardized quote that can be re-used	<ul style="list-style-type: none"><li>▼</li><li>Create a Word template</li><li>Create a Fetch XML report</li><li>Create a PowerBI app</li></ul>

Answer:

### Answer Area

Requirement	Configuration
Send quotes in a read-only format	<ul style="list-style-type: none"><li>▼</li><li>Use PDF</li><li>Use XML</li><li>Use RTF</li><li>Use CSV</li></ul>
Create a standardized quote that can be re-used	<ul style="list-style-type: none"><li>▼</li><li>Create a Word template</li><li>Create a Fetch XML report</li><li>Create a PowerBI app</li></ul>

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

✉  **Kyol** 1 year, 7 months ago

All formats are not read-only.

   upvoted 1 times

## Question 8

You need to determine the cause of the error for approved quotes.

Why does the error occur?

- A. The opportunity is in Active state.
- B. The quote template is in Active mode.
- C. The quote has been deleted.
- D. The quote is in Active state.

Answer: D

Bing: D

The error occurs because the quote is in Active state. The correct answer is D. Is there anything else you would like to know? 😊

## Question 9

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

How are they handled?

- A. moved to the account after the lead is qualified
- B. deleted after the lead is qualified
- C. stay with the inactive lead after the opportunity is qualified
- D. automatically moved to the opportunity after the lead is qualified

Answer: D

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

✉️  **Joana** 1 year, 5 months ago

**Selected Answer: D**

Just tested. It's D.

   upvoted 2 times

✉️  **zukito3** 1 year, 7 months ago

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

   upvoted 2 times

Bing: D

Notes and attachments are automatically moved to the opportunity after the lead is qualified. The correct answer is D.  
Is there anything else you would like to know? 😊

## Question 10

You need to create the required number of orders for ClientA.

How many orders should you create?

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

Answer: ET 给的 A, 一个用户选的 C 一个用户选的 D, 每人有两个评论, Bing 给的 A

✉ Net\_IT 4 months, 3 weeks ago

This question is BS, the client purchases from "multiple" regions ... How many though? 2? 3? 7?  
This is like saying "Johnny purchased a few apples at the store" and then asking "How many apples did Johnny purchase?" and giving 2, 3, 4 and 5 as possible answers ...

◀ ▶ ⚡ upvoted 1 times

✉ CDubz 2 months, 2 weeks ago

Exactly...LOL poor question.

I would go for A though in this case...order across multiple regions will be National with standardized pricing so 1 order should do...

◀ ▶ ⚡ upvoted 1 times

✉ Ram0883 6 months ago

Selected Answer: C

there are 3 main regions and hence 3 orders

◀ ▶ ⚡ upvoted 1 times

✉ Ram0883 7 months, 2 weeks ago

Selected Answer: C

Because it has 3 different regions Can , US and UK, for each region there will be 1 order

◀ ▶ ⚡ upvoted 1 times

✉ Candy2002 10 months, 2 weeks ago

Selected Answer: D

Sorry, should be D, as products are varies among regions & nationals. There are 4 regions for US, plus US, Canada & UK, total should be 7.

◀ ▶ ⚡ upvoted 1 times

✉ Candy2002 10 months, 2 weeks ago

Selected Answer: C

Don't think it is A, as the issue is stated it has multiple regions with same order, it doesn't make sense to be A. The company has 3 major regions, so I suggest C

◀ ▶ ⚡ upvoted 2 times

Bing:

Based on the information provided, ClientA purchases products from multiple regions for a single order. Since only national territory sales team members can send quotes and invoices across multiple territories, you should create **1** order for ClientA. So the correct answer is **A. 1**. Is there anything else you would like to know? 😊

# Case Study 2 - Bellows College

## Introductory Info

### 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 paperbased 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 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 CEO's 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:

<b>Report</b>	<b>Report description</b>
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.

Answer: B

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).

-  **ceejaybee** 1 year, 2 months ago  
In exam, Jun-22  
   upvoted 2 times
-  **An01234** 1 year, 3 months ago  
I wonder why A cannot be the answer. They said, "The report must contain a chart that displays the type of ticket purchaser (alumni, non-alumni, and student)." so I thought X axis should contain type of ticket purchaser.  
   upvoted 1 times
-  **NemoMone** 8 months, 1 week ago  
I assume with "Purchaser" the actual person who bought the ticket was meant  
   upvoted 1 times
-  **An01234** 1 year, 3 months ago  
On exam 23/04/ 2022  
   upvoted 1 times
-  **Wahby** 1 year, 5 months ago  
In exam 24/02/2022  
   upvoted 1 times

## 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

Answer: B

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

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

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

  **yp**  2 years, 6 months ago

Correct

   upvoted 5 times

  **yp**  2 years, 6 months ago

Launch a playbook to carry out activities consistently <https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/launch-playbook>

   upvoted 5 times

## 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	<div style="border: 1px solid black; padding: 5px;"><input type="checkbox"/> SQL Server Reporting Services <input type="checkbox"/> Fetch-based Reporting Services</div>
Discounts by Number of Employees	<div style="border: 1px solid black; padding: 5px;"><input type="checkbox"/> SQL Server Reporting Services <input type="checkbox"/> Fetch-based Reporting Services</div>

Answer:

### Answer Area

Report type	Option
Orders	<div style="border: 1px solid black; padding: 5px;"><input checked="" type="checkbox"/> SQL Server Reporting Services <input checked="" type="checkbox"/> Fetch-based Reporting Services</div>
Discounts by Number of Employees	<div style="border: 1px solid black; padding: 5px;"><input type="checkbox"/> SQL Server Reporting Services <input checked="" type="checkbox"/> Fetch-based Reporting Services</div>

<https://docs.microsoft.com/en-us/power-apps/maker/model-driven-apps/add-reporting-to-app?context=%2Fdynamics365%2Fcontext%2Fsales-context>

 **meg111111111111**  2 years, 4 months ago  
SQL Server Reporting Services reports. These reports use SQL queries and filtered views to retrieve report data. Filtered views restrict the data to what is available to the security role of the person running the report. All the default reports included with Customer Engagement (on-premises) are SQL-based reports.

You cannot access filtered views in Dynamics 365 Customer Engagement because access to the SQL database is not supported. If you have a Dynamics 365 (online) or Power Apps subscription, use Fetch-based reports for custom reporting.

Fetch-based Reporting Services reports. These reports use FetchXML queries that are proprietary to Customer Engagement (on-premises) instead of filtered views to retrieve data for reports. Reports that you create by using the Report Wizard are Fetch-based reports.

   upvoted 12 times

 **ducavall0**  2 years, 7 months ago  
<https://docs.microsoft.com/en-us/dynamics365/customerengagement/on-premises/analytics/get-started-writing-reports>  
   upvoted 6 times

 **Gosainsnehal**  1 year, 3 months ago  
THE ANSWER IS CORRECT. FETCH-BASED REPORT  
<https://docs.microsoft.com/en-us/power-apps/maker/model-driven-apps/add-reporting-to-app?context=%2Fdynamics365%2Fcontext%2Fsales-context>

System reports are available to all users. Individuals who create or otherwise own reports can share them with specific colleagues or teams or can make the reports available to the organization so that all users can run them. These reports use FetchXML queries that are proprietary to Microsoft Dataverse and retrieve data to build the report. Reports that you create in a Power Apps app are Fetch-based reports.

   upvoted 3 times

 **Cyrihars0** 2 years, 1 month ago  
Read the article and still didn't get which report type should be used here? Can someone help please.  
   upvoted 1 times

 **dpietmaniuk** 2 years ago  
What I grasped is if on-premise use SQL if online use Fetch-based reporting  
   upvoted 4 times

## 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	Answer Area	Option
Fiscal Year settings	Task Configure the accounting period.	option
Display As	Task Automatically configure accounting period names according to date.	option
Name Based On	Task Configure fiscal year abbreviations.	option
Fiscal Period template	Task Configure how accounting years are divided.	option

Answer:

Options	Answer Area	Option
	Task Configure the accounting period.	Fiscal Year settings
	Task Automatically configure accounting period names according to date.	Name Based On
	Task Configure fiscal year abbreviations.	Display As
	Task Configure how accounting years are divided.	Fiscal Period template

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

✉️  **StefmanIT65**  2 years, 8 months ago

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

   upvoted 11 times

✉️  **Ross22**  2 years, 2 months ago

Correct.

In the Fiscal Period Template drop-down list, select how your fiscal year is divided.

In the Fiscal Year drop-down list, select how you want to display the fiscal year.

In Name Based On drop-down list, select whether the fiscal year name is displayed on the start or end of the fiscal year.

In the Fiscal Period drop-down list, select how you want to display the fiscal period.

In the Display As drop-down list, select how you want the fiscal year abbreviation and the year to appear.

   upvoted 6 times

✉️  **Dean0918**  2 years, 5 months ago

Checked. Answer is correct.

   upvoted 3 times

## 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>

Answer: A

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

  **Jekkie** Highly Voted  2 years, 3 months ago

Correct! Https + the correct style/url format of D365.

   upvoted 7 times

  **ceejaybee** Most Recent  1 year, 2 months ago

**Selected Answer: A**

In exam, Jun-22

   upvoted 1 times

## Question 6

You need to identify new customer pending sales.

What should you do?

- A. Create status reasons in the solution and associate them with Open status
- B. Add statuses for all the pending sales stages
- C. Set all new leads to a default status of Qualified
- D. Configure the solution to automatically convert leads to opportunities

Answer: A

To support reporting, pending new customer sales will go through a verification process using the stages New, Pending Approval, Approved.

**Jenniferob** 1 year, 11 months ago

@atyachter and @HassanSarhan, have you guys written the exam recently?

upvoted 2 times

**atyachter** 1 year, 11 months ago

Status Values cannot be customized but status reasons CAN, therefore it is allowed to create reasons and associate them with open leads for new customers. A is the only one that make then.

upvoted 3 times

**HassanSarhan** 1 year, 11 months ago

Correct i think so also this is the only answer that makes sense

upvoted 1 times

**roborovski86** 2 years, 2 months ago

1. You are setting up Dynamics 365 Customer Insights.

You need to retrieve data from Dynamics 365 Sales and Dynamics 365 Field Service.

Which option should you use?

Select only one answer.

Import data.

Connect to Common Data Model folder.

Create a custom connector.

Transform the data.

upvoted 1 times

**fyh** 2 years, 1 month ago

Connect to Common Data Model folder.

I guess...

upvoted 1 times

**HassanSarhan** 2 years, 1 month ago

Connect to Common Data Model folder?? I don't think so

upvoted 1 times

**aish** 2 years, 3 months ago

did not get this

upvoted 3 times

**yp** 2 years, 6 months ago

Correct

upvoted 2 times

## Question 7

HOTSPOT -

You need to configure group sales discounts for alumni.

Which discount type parameters 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

Quantity	Discount type parameter
10	<input type="checkbox"/> Begin Quantity <input type="checkbox"/> End Quantity <input type="checkbox"/> Percentage
20	<input type="checkbox"/> Begin Quantity <input type="checkbox"/> End Quantity <input type="checkbox"/> Percentage
42	<input type="checkbox"/> Begin Quantity <input type="checkbox"/> End Quantity <input type="checkbox"/> Percentage

ET User:

End Quantity

End Quantity

Percentage / Begin Quantity

ZZ9PluralZA Highly Voted 2 years, 2 months ago

This question should be taken out and shot.

upvoted 28 times

Bonso Highly Voted 2 years ago

This question makes absolutely no sense to me.

upvoted 14 times

[Removed] Most Recent 3 months ago

End Quantity - Up to 10 in group

End Quantity - Up to 20 in group

Begin Quantity - 20 or more in group

No?

Agree with ZZ9PluralZA though...this question should be taken out back and stoned

upvoted 1 times

dalones213 9 months, 3 weeks ago

If 42 would be percentage - it is exactly the discounted price of the "Alumni > 20 = 30\$" (full price=50; 42% discount=final price would be 30\$.) Which would mean that 20 is Begin Quantity.

I have no idea what does 10 mean, though. 10% is the markup for the Alumni category. But how would that translate into D365? Do we have a place where we can add markup?

upvoted 1 times

No\_Doubt 5 months, 2 weeks ago

$50 \times 0.58 = 29$

upvoted 1 times

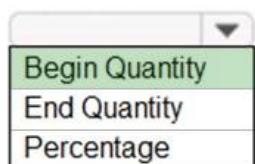
- ✉ **Candy2002** 10 months, 4 weeks ago  
 I have no idea about the question, but may I clarify if the selling price of alumni?  
 The price of alumni is by cost. The makeup is 10%. I suppose the selling price is 38.5?  
1 1 1 upvoted 1 times
- ✉ **d365ppp** 1 year, 1 month ago  
 The answer is correct. Begin-10, 20 - % as the proposed strategy for the sales manager, 42 is the end quantity if someone is buying 42 tickets.  
 \*\*\*"Being, Percentage and End are the correct answers."\*\*\*  
1 1 1 upvoted 1 times
- ✉ **prepare4exam** 1 year, 1 month ago  
 on exam today June-22. It still makes no sense to me.  
1 1 1 upvoted 1 times
- ✉ **ceejaybee** 1 year, 2 months ago  
 In exam, Jun-22  
1 1 1 upvoted 1 times
- ✉ **TheChoseOne** 1 year, 2 months ago  
 Does anyone know what the correct answer is?  
1 1 1 upvoted 1 times
- ✉ **An01234** 1 year, 4 months ago  
 on exam  
1 1 1 upvoted 1 times
- ✉ **gvldesigner** 1 year, 5 months ago  
 a. Begin quantity. Enter the minimum quantity a customer should purchase to be eligible for the discount.  
 b. End quantity. Enter the maximum quantity for which the discount is applicable.  
 c. Percentage or Amount. Enter the percentage or the amount of discount the customer will receive.  
1 1 1 upvoted 3 times
- ✉ **Jurka** 1 year, 3 months ago  
 According to this the answer should be begin-begin-begin right? We want to apply the first discount for 10 tickets, second one for 20 and for anything larger the third discount. Minimum quantity for first discount is 10, min for second is 20 and min for third is 21  
1 1 1 upvoted 1 times
- ✉ **cskurtveit94** 1 year, 5 months ago  
 I believe the answer is " 10 - End" 20 - end" and " 42 - percentage because of the price increase from \$35 this season and the standard ticket price \$50"  
1 1 1 upvoted 3 times
- ✉ **JoeS007** 1 year, 8 months ago  
 What is the answer? 10=End, 20=End, 42=Begin? I hate this question  
1 1 1 upvoted 4 times
- ✉ **SalvoIAV** 1 year, 4 months ago  
 I think so  
1 1 1 upvoted 1 times
- ✉ **atyachter** 1 year, 12 months ago  
 "Discount Lists" can have two types, Percent or Amount. "Discounts" require you to select a discount type base off the Discount List you are adding it to. Quantity 10 relates to "end quantity" of the first alumni discount tier (\$2 discount amount). Quantity 20 relates to End Quantity of Tier 2 (\$4 discount amount). 42??? Discount List type= amount. I would argue all discount types are amounts. Horrible question.  
1 1 1 upvoted 5 times
- ✉ **lakshmig** 2 years, 2 months ago  
 this question is there in the actual exam as on 23rd june 2021  
1 1 1 upvoted 5 times
- ✉ **rihin2011** 2 years, 2 months ago  
 Can't understand.  
1 1 1 upvoted 5 times
- ✉ **ad3791** 2 years, 2 months ago  
 Why aren't they all percentage because all these groups should get a discount.  
1 1 1 upvoted 3 times
- ✉ **Candy2002** 10 months, 4 weeks ago  
 Haha, maybe we make the question too complicate. Indeed, the discount type only has 2 options discount / precentage. For me, I would choose Begin, End, Precentage.  
 10 - 19 \$33  
 20 - 20 \$31  
 21 > \$30  
 The 42 number sounds irrelevant to me.  
1 1 1 upvoted 1 times

ET Answer:

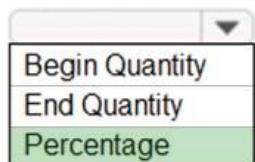
## Answer Area

Quantity      Discount type parameter

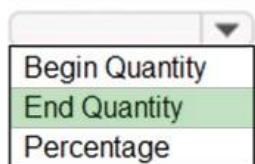
10



20



42



## Question 8

HOTSPOT -

You need to create a discount list for ticket sales.

Which pricing methods 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

Ticket price	Method
Alumni	<input type="checkbox"/> Percent Markup – Current Cost <input type="checkbox"/> Percent Margin – Current Cost <input type="checkbox"/> Percent Margin – Standard Cost
Non-alumni	<input type="checkbox"/> Percent Markup – Current Cost <input type="checkbox"/> Percent Margin – Current Cost <input type="checkbox"/> Percent Margin – Standard Cost

ET User:

Markup – Current

Margin – Standard

 **atyachter**  1 year, 11 months ago

Pricing methods are tied to price lists NOT Discount Lists.

Alumni:\$35=Current Cost=10% markup. Answer=Markup - Current

Non Alumni: \$50=Standard rate= 12% margin. Answer= Margin - Standard

   upvoted 14 times

 **CDubz**  2 months, 2 weeks ago

Standard Cost + Percentage margin - (Non-alumni ticket purchases are priced based on the standard rate.)

Current Cost + Percentage Markup - (Alumni ticket purchases are priced at the current cost.)

   upvoted 1 times

 **ceejaybee** 1 year, 2 months ago

In exam, Jun-22

   upvoted 1 times

 **lakshmis** 2 years, 1 month ago

FOR ALUMNI , it should be current cost(both markup and margin are provided as per the problem statement) , for non -alumni it is standard cost with percentage margin

   upvoted 1 times

 **ZZ9PluralZA** 2 years, 1 month ago

Alumni info given state basis is current cost, but show both markup and margin. Do we simply pick one arbitrarily? Non-alumni info given state standard cost and show margin, so answer should be C for Q2.

   upvoted 4 times

ET Answer:

## Answer Area

Ticket price	Method
Alumni	<div style="border: 1px solid black; padding: 5px;"><p>Percent Markup – Current Cost</p><p>Percent Margin – Current Cost</p><p>Percent Margin – Standard Cost</p></div>
Non-alumni	<div style="border: 1px solid black; padding: 5px;"><p>Percent Markup – Current Cost</p><p>Percent Margin – Current Cost</p><p>Percent Margin – Standard Cost</p></div>

## Question 9

HOTSPOT -

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

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

NOTE: Each correct selection is worth one point.

Hot Area:

### Answer Area

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

Answer:

### Answer Area

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

✉  **Jekkie**  2 years, 3 months ago

Seems correct :)

   upvoted 10 times

✉  **HassanSarhan** 1 year, 11 months ago

yes thanks

   upvoted 2 times

✉  **ceejaybee**  1 year, 2 months ago

In exam, Jun-22

   upvoted 1 times

## Question 10

You need to resolve the sales manager's issue regarding private box customers.

What should you do?

- A. Convert all incoming phone calls to leads.
- B. Convert the dean's phone call to an opportunity.
- C. Convert the sales manager's emails to leads.
- D. Convert the sales manager's emails to opportunities.

Answer: C

✉️  **ceejaybee** 1 year, 2 months ago

In exam, Jun-22

   upvoted 1 times

✉️  **Ross22** 2 years, 2 months ago

Private box and group sales for new customers will be entered as leads and will follow a standardized sales process.

   upvoted 3 times

✉️  **Ross22** 2 years, 2 months ago

"Private box and group sales for new customers will be entered as leads and will follow a standardized sales process." In Private box seats paragraph, second last sentence.

   upvoted 3 times

## Question 11

You need to configure a phone call activity for the dean.

To which value should you set the value of the Call With field?

- A. stakeholder
- B. record owner
- C. contact name
- D. dean

Answer: C

<https://docs.microsoft.com/en-us/dynamics365/customerengagement/on-premises/basics/add-phone-call-task-email-appointment-activity-case-record>

✉ **Jekkie** Highly Voted 2 years, 3 months ago

Awful question since the lookup fields on Phone Call are named 'Call From' and 'Call To'....'Call With' doesn't exist. Since they probably mean 'Call To', C seems the correct answer.

1 like 1 comment 7 upvotes

✉ **ibrc** 2 years, 3 months ago

yes, i agree with you

1 like 1 comment 1 upvotes

✉ **yakusaclan** 1 year, 9 months ago

The Call With field is automatically populated with the customer name you select in the account or contact field. You can select a different contact, account, lead, or user record if required.  
<https://docs.microsoft.com/en-us/dynamics365/customerengagement/on-premises/basics/add-phone-call-task-email-appointment-activity-case-record>

1 like 1 comment 2 upvotes

✉ **Candy2002** Most Recent 10 months, 2 weeks ago

**Selected Answer:** C

Dean would like to thanks for the CEO, C is probably correct.

1 like 1 comment 1 upvotes

✉ **christosp619** 1 year, 5 months ago

**Selected Answer:** C

yakusaclan explanation and link are correct

1 like 1 comment 1 upvotes

✉ **Bonso** 2 years ago

Given the Dean is calling the CEO, would that not be a Stakeholder?

1 like 1 comment 3 upvotes

✉ **lakshmi9** 2 years, 1 month ago

Since the activity is to be configured for DEAN, i guess the answer should be DEAN

1 like 1 comment 1 upvotes

## Question 12

You need to configure pricing for the Contoso, Ltd. invoice.

What should you do?

- A. Configure an end date for the price list.
- B. Set the Invoice Product to Use Default.
- C. Set the Invoice Product to Override Price.

ET User: C/B

✉️ **Ross22** Highly Voted 2 years, 2 months ago

Correct

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

1 like, 2 shares, 1 upvote

✉️ **CDubz** Most Recent 2 months, 2 weeks ago

Also going with B...no supporting info to choose C

1 like, 2 shares, 1 upvote

✉️ **Candy2002** 10 months, 2 weeks ago

Selected Answer: B

I will go for B too, seems there is no reason to override the price

1 like, 2 shares, 2 upvotes

✉️ **MsSana** 9 months, 3 weeks ago

As per the scenario: product prices on the invoice can be changed at the salesperson's discretion. C is correct

1 like, 2 shares, 1 upvote

✉️ **JoeS007** 1 year, 8 months ago

I guess, but I don't see why it has to be C. There is no additional information on what exactly Contoso wants to buy. Seems like B could be correct.

1 like, 2 shares, 2 upvotes

✉️ **AAR75** 1 year, 3 months ago

Contoso Ltd want to buy Private box seats. As contoso is existing customer, Opportunity is entered opportunities and then converted to order to invoice, which will use default pricing.

1 like, 2 shares, 1 upvote

✉️ **JasKsz** 1 year ago

All I see is "they are ready to purchase group tickets", why would this need to be override?

1 like, 2 shares, 1 upvote

ET Answer: C

## Question 13

DRAG DROP -

You need to create invoices for all customers.

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

NOTE: Each correct selection is worth one point.

Select and Place:

Products	Answer Area	Product
Price List Product	Option	product
Non-catalog Product	Existing product	product
Opportunity Product	Write-in product	product
	Get product	product

Answer:

Products	Answer Area	Product
Price List Product	Option	Price List Product
Non-catalog Product	Existing product	Non-catalog Product
Opportunity Product	Write-in product	Opportunity Product
	Get product	

 haru\_\_\_\_1 2 weeks ago

Seems correct

   upvoted 1 times

 MsSana 9 months, 3 weeks ago

Correct

   upvoted 1 times

 Jurka 1 year, 2 months ago

Seems correct

   upvoted 2 times

 EduardoMatheus 1 year, 5 months ago

on the exam 24.02.2022

   upvoted 1 times

# Case Study 3 - A company

## Introductory Info

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 -**

The Tickets dashboard has eight sections. The dashboard includes a line chart that displays data about age groups. The dashboard also has a chart that group ticket sales. The chart shows 10 or more tickets sold but is missing accounts that purchased more than 20 tickets. Cashiers report that they cannot see two specific area of the Tickets dashboard. Salespeople report that they can see all areas of the dashboard.

Representative1 is unable to scan business cards.

Some users do not see the business cards when using their desktop machines, but they see them from their tablets and mobile phones.

There are no business card images in the system.

Duplicate contacts are being created with business card scans.

## 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

Answer: D

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.

<https://docs.microsoft.com/en-us/power-platform/admin/system-settings-dialog-box-goals-tab>

✉️  **Natalia**  2 years, 8 months ago

References: <https://docs.microsoft.com/en-us/power-platform/admin/system-settings-dialog-box-goals-tab>

   upvoted 14 times

✉️  **Kyol**  1 year, 7 months ago

Question doesn't even make sense.

   upvoted 2 times

## Question 2

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: 三有争议

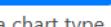
## Answer Area

Scenario	Configuration								
Tickets dashboard	<table border="1"><tr><td>Permissions</td><td>▼</td></tr><tr><td>View on dashboard</td><td></td></tr><tr><td>Dashboard type</td><td></td></tr><tr><td>Chart type</td><td></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><td>▼</td></tr><tr><td>Dashboard type</td><td></td></tr><tr><td>Series</td><td></td></tr><tr><td>Field in view</td><td></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><td>▼</td></tr><tr><td>Dashboard type</td><td></td></tr><tr><td>Series</td><td></td></tr><tr><td>Chart type</td><td></td></tr></table>	Field to view	▼	Dashboard type		Series		Chart type	
Field to view	▼								
Dashboard type									
Series									
Chart type									

✉  **Lemppy**  2 years, 4 months ago

I think the answer to the third has some thing to do with Top/Bottom rules. So, the answer Series is the closest one.

   upvoted 5 times

✉  **Veektoreous**  2 years, 4 months ago

It should also be a chart type

   upvoted 3 times

✉  **aok95** 2 years, 6 months ago

I understand the first two but why is it series for the third?

   upvoted 2 times

## Question 3

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

Price lists

Competitor list

#### Action

Action

Action

ET User:

Add the security role to the manager's user ID for both

✉ **Jekkie** Highly Voted 2 years, 3 months ago

As both the price list and the competitor entities are organization owned, you can't limit data by using business units. I don't see the point of exporting any of them to a static list. Both entities can be controlled by a security role, by means of adding/removing privileges...so I guess both should be 'add a security role'?

1 like 1 reply upvoted 11 times

✉ **Candy2002** 10 months, 2 weeks ago

Yes, it doesn't make sense to me on exporting the list. The question does not have any information on whether it is a static worksheet. It should be granting the manager to read the competitor list to get the update list.

1 like 1 reply upvoted 1 times

✉ **klnv000** 2 years, 2 months ago

The question mentioned "You need to ensure that new managers receive the information they need." The fact that it uses the word "receive" almost sounds like the manager are expecting a file, instead of viewing the data in system. But of course, I could be overthinking it.

1 like 1 reply upvoted 3 times

✉ **lakshmiq** Most Recent 2 years, 1 month ago

Above ANSWERS seems fine to me

1 like 1 reply upvoted 1 times

✉ **veektoreous** 2 years, 4 months ago

Being in the correct business unit should also mean that new managers can access both competitors and price lists. Right?

1 like 1 reply upvoted 2 times

✉ **vpearson** 2 years, 7 months ago

The list of competitors is dynamic as they are constantly being added, while it seems that the pricing structure is fixed... should these answers not be swapped?

1 like 1 reply upvoted 1 times

ET Answer:

### Actions

Create a playbook template

Export the list to a file

Add the manager's user ID to the correct business unit

Add the security role to the manager's user ID

### Answer Area

#### Information

Price lists

Competitor list

#### Action

Add the manager's user ID to the correct business unit

Export the list to a file

## Question 4

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

ET User: E

**E (50%)**    **B (33%)**    **C (17%)**

<https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/customize-business-card-scan-control>

<https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/scan-business-cards>

<https://community.dynamics.com/365/sales/f/dynamics-365-for-sales-forum/419876/mb-210-business-cards>

✉ zzcevic Highly Voted 2 years, 9 months ago

E  
<https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/customize-business-card-scan-control>  
1 like, 1 reply, 1 upvoted 21 times

✉ avow 2 years, 7 months ago

I understand how you got there but I think you are wrong and it is B. The issue isn't about the fields populating the data from the card, but the actual image of the card being displayed itself after being scanned. <https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/scan-business-cards>

1 like, 1 reply, 1 upvoted 6 times

✉ Dean0918 2 years, 5 months ago

I agree with B.  
<https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/scan-business-cards>

1 like, 1 reply, 1 upvoted 4 times

✉ HassanSarhan 1 year, 12 months ago

Correct answer is E thanks  
1 like, 1 reply, 1 upvoted 1 times

✉ Pirozhok Most Recent 4 months, 1 week ago

Selected Answer: E

I'd go for E  
<https://community.dynamics.com/365/sales/f/dynamics-365-for-sales-forum/419876/mb-210-business-cards>  
1 like, 1 reply, 1 upvoted 1 times

✉ inscho 6 months, 4 weeks ago

Selected Answer: C

Hey guys, the issues quotes "Some users do not see the business cards when using their desktop machines, but they see them from their tablets and mobile phones." While B) and E) would be a fix for all users, only C) would explain why just "some" users do no see the business cards. If understood correct, the issue isn't about the scanner function itself, but that the (scanned) business card is not shown. To me it indicates towards a permission issue. However, I haven't seen that the business card is bound to a specific permission / license. I still will go with C.

Like Upvote 1 times

✉ inscho 6 months, 4 weeks ago

What could also be is that they have different forms in place. It is common that clients require different forms for mobile than for desktop. Plus, forms are bound to security roles. If "some user" had the same security role with the same form, they can have the same issue. Then, A would be the answer.

Like Upvote 1 times

✉ Candy2002 10 months, 4 weeks ago

Selected Answer: B

By viewing the comments from avow and dean0918, purely sure it is B

Like Upvote 1 times

✉ EgycrmDev 12 months ago

Selected Answer: E

Correct answer is E

Like Upvote 2 times

✉ d365ppp 1 year, 1 month ago

Selected Answer: D

<https://docs.microsoft.com/en-us/dynamics365/sales/retain-business-card-image-after-scanning>  
To enable or disable from the App settings page

In the Sales Hub app, select the Change area icon to change the work area. in the lower-left corner and then select App Settings.

Under General Settings, select Overview.

Select Manage next to Business card scan.

Set Scan and digitize business cards to Yes or No depending on whether your organization wants to save and associate the business card images with the contact or lead record.

Save the changes.

Like Upvote 1 times

✉ TheMaty 1 year, 5 months ago

Business Card field of Contact entity is multilines text and filled by AI Builder Business Card PCF Control so There is no relation with "Show Image in the form" property of Contact.

I did a test and verified unchecking "Show image in the form" disappeared icon just beside the contact name . In that occasion, i even was able to see Business Card in the form.

However, businesscard is name of the field and configured with AI Builder Business Card control. The PCF control is set for type of clients .

There are 3 values

- 1- Web
- 2- Phone
- 3- Tablet

as a result, Users can not see business card in web unless "web" is marked properly

my vote goes to E

Like Upvote 2 times

✉ estrella2008 1 year, 4 months ago

Fully agreed, as the situation mentions that mobile and tablet users DO see the business cards, so Security Roles are in place, even so is AI Builder Add-on.

Here is the url: <https://docs.microsoft.com/en-us/dynamics365/sales/customize-business-card-scan-control>

Like Upvote 1 times

✉ lakshmig 2 years, 1 month ago

i think E

Like Upvote 3 times

✉ sl1200 2 years, 3 months ago

Once again, the key is: "Some users do not see the business cards when using their desktop machines, but they see them from their tablets and mobile phones" Open Form. Double click on field control, controls tab and set "Web" for the AI Builder Business Card Control.

Correct answer: E

Like Upvote 4 times

✉ Hmelin23 2 years, 4 months ago

I still think "B", because the display settings on the devices are in the form properties.

<https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/customize-business-card-scan-control>

Like Upvote 1 times

✉ Veektoreous 2 years, 5 months ago

I agree with option B

Like Upvote 1 times

✉ MildMildWest 2 years, 7 months ago

E. Because once you add a placeholder field (single line text or multiple lines) to your Main lead form, you can add the AI Build Business Card control to the field, and bind its Default Image property to the 'businesscard (Multiple)' in order to display the image. Note that Settings -> Administration -> System Settings -> Sales -> 'Save business card images' needs to be set to 'Yes'

Like Upvote 4 times

## Question 5

DRAG DROP -

You need to handle large quantity opportunities.

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

Select and Place:

Actions	Answer Area
Navigate to Sales Hub and select <b>Opportunities</b> .	
Edit a product record.	
Navigate to the Additional detail tab.	
Navigate to Sales Hub and select <b>Products</b> .	
Navigate to the Quotes tab.	
Edit an opportunity record.	
Select <b>Get Products</b> .	

Drag and drop the actions from the left column to the right column. Use the arrows to move items up and down.

Answer:

Actions	Answer Area
Navigate to Sales Hub and select <b>Opportunities</b> .	Navigate to Sales Hub and select <b>Opportunities</b> .
Edit a product record.	Edit an opportunity record.
Navigate to the Additional detail tab.	Navigate to the Quotes tab.
Navigate to Sales Hub and select <b>Products</b> .	Select <b>Get Products</b> .
Navigate to the Quotes tab.	
Edit an opportunity record.	
Select <b>Get Products</b> .	

Drag and drop the actions from the left column to the right column. Use the arrows to move items up and down.

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

<https://docs.microsoft.com/en-us/dynamics365/sales/add-products-qoi-enhanced>

✉ SalvoIAV 1 year, 4 months ago

"Get product" command is available within the Quote record (<https://docs.microsoft.com/en-us/dynamics365/sales/create-edit-quote-sales> AND <https://docs.microsoft.com/en-us/dynamics365/sales/add-products-qoi-enhanced>). So, what is the best path to manage large quantity opportunity?

1 like, 1 reply, 3 upvotes

✉ Candy2002 10 months, 2 weeks ago

I think the question is very misunderstanding. It said manage opportunities-es, I was thinking how to convert many opportunities record to quotes. By the answer provided, the question should be referring to how an individual staff manage to convert a large quantity of products within an opportunity into a quotation.

1 like, 1 reply, 1 upvote

✉ EduardoMatheus 1 year, 5 months ago

on the exam 24.02.2022

1 like, 1 reply, 2 upvotes

## Question 6

You need to create orders for large quantity purchases.

What are two possible ways to achieve this goal? Each correct answer presents a complete solution

NOTE: Each correct selection is worth one point.

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

ET User: DE/AD

 **AndreaDP** Highly Voted 1 year, 7 months ago

The question asks to create an order with many product item, so I think the right answer is D and E. B doesn't seem to be right, if you close the quote as won doesn't create the order.

   upvoted 5 times

 **SalvoAV** 1 year, 4 months ago

OK but E sounds like a "Field Service" option. Moreover, in the description of the Business Case we have "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." ...

D is OK

   upvoted 1 times

 **Candy2002** Most Recent 10 months, 2 weeks ago

Selected Answer: AD

Looking back to the question, "Customers who buy a smaller quantity of tickets that do not have quotes must have an invoice sent to them."

The staff may issue invoice if it is a smaller amount of tickets, after ruling out B, D, E and reading on the questions, I think AD is too correct answer.

   upvoted 1 times

 **anjanraiz** 1 month ago

The question says large quantity purchase. So, I don't think A will be a correct choice.

   upvoted 1 times

 **Candy2002** 10 months, 2 weeks ago

I think the correct answer is A & D.

B is incorrect as there is no way to copy a quote and save it as won. I have tried to "Revise" an active quote, the old quote will be closed and there will be no "Save as Won" option.

C is incorrect, I don't see any prompted on system about "Won".

E is incorrect, as work order is not equal to order, they are different things.

Looking back to the question, "Customers who buy a smaller quantity of tickets that do not have quotes must have an invoice sent to them."

The staff may issue invoice if it is a smaller amount of tickets, after ruling out B, D, E and reading on the questions, I think AD is too correct answer.

   upvoted 1 times

 **Gri53** 7 months, 1 week ago

Question says to CREATE ORDERS. (A) 'create an invoice from the order record' does not create an order. Can't be correct for this question

   upvoted 1 times

 **pumpkin2** 1 year, 5 months ago

On exam March 2022

   upvoted 1 times

 **christosp619** 1 year, 5 months ago

Convert to work order is part of Dynamics 365 Field Service.

At Background it says 'The company plans to implement Dynamics 365 Sales.'

So the answer is correct as you can repeat the 2 steps multiple times(copy quote -> save as won -> create order)

   upvoted 1 times

  **JoeS007** 1 year, 8 months ago

You can make a copy by revising the quote, however there is no "save as won" option. You would have to activate and then create the order.

   upvoted 2 times

  **Candy2002** 10 months, 2 weeks ago

Yes, so I bet the answer is AD. As B,C,E are ruling out.

   upvoted 1 times

ET Answer: BD

## Question 7

DRAG DROP -

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

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

NOTE: Each correct selection is worth one point.

Select and Place:

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

Answer:

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

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

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

✉ SalvoIAV 1 year, 4 months ago

I do not get this one...

Like Share Flag upvoted 1 times

✉ moodi86 1 year, 7 months ago

WHY? should only be Opp close for both

Like Share Flag upvoted 3 times

## Question 8

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

What should you do?

- A. Create a product catalog.
- B. Create a quote with a write-in product.
- C. Create a workflow for price list.
- D. Create an opportunity.

Answer: A

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

✉️ Net\_IT 4 months, 3 weeks ago

I would have thought the correct answer here was to create a discount list ... But since that's not an option Product Catalog I suppose.

👍👎FLAG upvoted 1 times

✉️ louLou2105 1 year, 8 months ago

Why not creating an opportunity and use the Get Product function on a quote?

👍👎FLAG upvoted 3 times

## Question 9

You need to configure the system to handle all ticket sales.

What should you configure?

- A. Discount Lists
- B. Product Bundles
- C. Product Catalog Settings
- D. Goals

Answer: A

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

✉️  **Candy2002** 10 months, 2 weeks ago

**Selected Answer: A**

There is a bulk purchase discount on the tickets. Pretty straight forward, so I think it is A.

   upvoted 3 times

✉️  **Marchi26** 1 year ago

D. goals is correct?

   upvoted 1 times

## Question 10

You need to choose where to enter the other show names in the system.

Where should you add the shows?

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

Answer: A

[https://neilparkhurst.com/2019/07/07\(mb-210-microsoft-dynamics-365-for-sales-competitors/](https://neilparkhurst.com/2019/07/07(mb-210-microsoft-dynamics-365-for-sales-competitors/)

👤 Candy2002 10 months, 2 weeks ago

Selected Answer: A

It is A. Opportunities that are lost must include the reasons other show and not interested. Whenever, there is a lost, we must put other show's name for tracking competitor.

👍 ↗️ 🎟️ upvoted 1 times

👤 ceejaybee 1 year, 2 months ago

Selected Answer: A

"Other shows" means what other theatres are doing; best place to record this is Competitors

👍 ↗️ 🎟️ upvoted 3 times

👤 SeekerShan 2 years, 6 months ago

Why not Account?

👍 ↗️ 🎟️ upvoted 1 times

👤 MarkHelou 2 years, 8 months ago

why not product? competitor does not make sence

👍 ↗️ 🎟️ upvoted 2 times

👤 qvex 2 years, 8 months ago

It's about the shows of other theatres:

"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."

And these entries are best to put in competitors, s. also: [https://neilparkhurst.com/2019/07/07\(mb-210-microsoft-dynamics-365-for-sales-competitors/](https://neilparkhurst.com/2019/07/07(mb-210-microsoft-dynamics-365-for-sales-competitors/)

👍 ↗️ 🎟️ upvoted 16 times

👤 MeThisIs 2 years, 3 months ago

I got caught by this question too: "Other Shows" is a reference to competitors, so A it is.

👍 ↗️ 🎟️ upvoted 6 times

👤 HassanSarhan 1 year, 11 months ago

A is correct, thanks

👍 ↗️ 🎟️ upvoted 2 times

## Question 11

DRAG DROP -

You need to choose which product's solution fits the analysis needed.

Which solutions should you use? To answer, drag the appropriate solutions to the correct analyses. Each solution may be used once, more than once, or not at all.

You may need to drag the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

Select and Place:

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

ET User:

1. Both
2. Both
3. Only Premium Sales Insight

<https://docs.microsoft.com/en-us/dynamics365/sales/intro-admin-guide-sales-insights#get-started-with-premium-sales-insights-features>

✉ SalvoAV **Highly Voted** 1 year, 4 months ago

Considering that the Premium Sales Insight offers all the Standard Sales Insight features + additional feature, such as Conversation Intelligence, the correct answer would be:

1. Both
2. Both
3. Only Premium Sales Insight

<https://docs.microsoft.com/en-us/dynamics365/sales/intro-admin-guide-sales-insights#get-started-with-premium-sales-insights-features>

◀ ▶ ⌂ upvoted 7 times

✉ ChandanKC **Most Recent** 1 year, 9 months ago

Please can someone explain the answers?

◀ ▶ ⌂ upvoted 2 times

ET Answer:

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

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

# Case Study 4 - Contoso, Ltd.

## Introductory Info

### 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.

Answer: BE

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

  **EK1986** 1 year, 6 months ago

In exam 04.02.2022

   upvoted 2 times

## 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

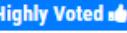
Chart requirement	Configuration
Type of chart	<input type="checkbox"/> Column <input type="checkbox"/> Pie <input type="checkbox"/> Funnel
Horizontal Category Axis label	<input type="checkbox"/> Actual Close Date <input type="checkbox"/> Status <input type="checkbox"/> Created on <input type="checkbox"/>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

Answer: 最后一个有争议

## Answer Area

Chart requirement	Configuration				
Type of chart	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="background-color: #669966; color: white; padding: 2px;">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" style="width: 100%; border-collapse: collapse;"> <tr><td style="background-color: #669966; color: white; padding: 2px;">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" style="width: 100%; border-collapse: collapse;"> <tr><td style="background-color: #669966; color: white; padding: 2px;">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" style="width: 100%; border-collapse: collapse;"> <tr><td style="background-color: #669966; color: white; padding: 2px;">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					

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

✉  **loulou2105**  1 year, 8 months ago

Do lost opportunities have actual revenues?

   upvoted 9 times

✉  **No\_Doubt** 5 months, 1 week ago

Logically zero :)

   upvoted 1 times

✉  **JudT** 2 months ago

A lost Revenue is the amount that you've actually lost.

An opty of 100 lost, will be an actual revenue lost of 100. We can't leave it at zero.

   upvoted 1 times

✉  **SashM** 1 year, 4 months ago

I think answer for lost oppo is est renvue.

   upvoted 4 times

✉  **SalvoIAV** 1 year, 4 months ago

Yes, I believe the given answers are correct

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

   upvoted 3 times

 **JudT** [Most Recent](#) 2 months ago

Column  
Actual Close Date  
Actual REV  
Actual REV  
Est Revenue

   upvoted 1 times

 **CDubz** 2 months, 2 weeks ago

Column  
Actual Close Date  
Actual Revenue  
Est Revenue

   upvoted 1 times

 **No\_Doubt** 5 months, 1 week ago

For the last choice I'd say "Est. Revenue"  
For a reason that Actual Revenue will always be zero for lost opportunities, and using the estimated value for the lost data series will give clear view for managers to know how much the company has lost.

   upvoted 1 times

 **EduardoMatheus** 1 year, 5 months ago

In exam 24.02.2022

   upvoted 2 times

 **EK1986** 1 year, 6 months ago

In exam 04.02.2022

   upvoted 2 times

 **EK1986** 1 year, 5 months ago

is this the correct answer

   upvoted 1 times

## 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.	<ul style="list-style-type: none"><li>Set the hierarchical entity to Territory.</li><li>Set the rollup entity to Product.</li><li>Set the goal metric to Revenue.</li><li>Set the hierarchical entity to Product.</li></ul>
Include current revenue targets.	<ul style="list-style-type: none"><li>Upload quota data for each territory.</li><li>Create a goal metric.</li><li>Create a goal target for revenue.</li><li>Upload a goal target from an Excel template.</li></ul>
Include both high confidence and won opportunities.	<ul style="list-style-type: none"><li>Create a calculated column and add it to the column layout.</li><li>Add the Committed and Won values to the column layout.</li><li>Create a rollup column and add it to the column layout.</li><li>Add a calculated value to the Opportunities Forecast view.</li></ul>

Answer:

### Answer Area

Requirement	Action
Include projected revenue by factory capacity.	<ul style="list-style-type: none"><li>Set the hierarchical entity to Territory.</li><li>Set the rollup entity to Product.</li><li>Set the goal metric to Revenue.</li><li>Set the hierarchical entity to Product.</li></ul>
Include current revenue targets.	<ul style="list-style-type: none"><li>Upload quota data for each territory.</li><li>Create a goal metric.</li><li>Create a goal target for revenue.</li><li>Upload a goal target from an Excel template.</li></ul>
Include both high confidence and won opportunities.	<ul style="list-style-type: none"><li>Create a calculated column and add it to the column layout.</li><li>Add the Committed and Won values to the column layout.</li><li>Create a rollup column and add it to the column layout.</li><li>Add a calculated value to the Opportunities Forecast view.</li></ul>

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

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

✉️  **EK1986** 1 year, 6 months ago

In exam 04.02.2022

   upvoted 3 times

## 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.	<div style="border: 1px solid black; padding: 5px;"><p>Data step and set as required</p><p>Stage with a branching rule</p><p>Action step</p></div>
Require a sales manager review.	<div style="border: 1px solid black; padding: 5px;"><p>Branching rule based on the management review step</p><p>Branching rule based on the lead qualification step</p><p>Branching rule based on the opportunity step</p></div>
Track RFQ management approval.	<div style="border: 1px solid black; padding: 5px;"><p>Stage</p><p>Approval flow</p><p>Branch rule</p></div>

Answer:

### Answer Area

Requirement	Configuration
Verify that the credit and reference checks are completed for new customers.	<div style="border: 1px solid black; padding: 5px;"><p>Data step and set as required</p><p>Stage with a branching rule</p><p>Action step</p></div>
Require a sales manager review.	<div style="border: 1px solid black; padding: 5px;"><p>Branching rule based on the management review step</p><p>Branching rule based on the lead qualification step</p><p>Branching rule based on the opportunity step</p></div>
Track RFQ management approval.	<div style="border: 1px solid black; padding: 5px;"><p>Stage</p><p>Approval flow</p><p>Branch rule</p></div>

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

✉ mrejay 1 year, 6 months ago

looks good.

👍 ↗ 📈 upvoted 2 times

✉ EK1986 1 year, 6 months ago

In exam 04.02.2022

👍 ↗ 📈 upvoted 3 times

## 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**

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

Answer:

**Answer Area**

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

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

- ✉️  **Sarah050320** 5 months, 1 week ago  
For question 3, why not just lead entity? Credit check should be done in the qualify stage. Hence, shouldn't it be just lead?  
   upvoted 2 times
- ✉️  **Sarah050320** 5 months, 1 week ago  
For second question, it must be option 1.  
"Ensure sales reps always have the latest sales and training materials to close a deal by associating documents with playbook activities that you add to a playbook template. For example, create a playbook template that sales reps can follow when the decision maker they are working with leaves the organization. While adding activities to this template, you can also attach documents that help the sales rep bring the new decision maker up to speed."  
   upvoted 2 times
- ✉️  **JudT** 2 months, 1 week ago  
That's right. option 1 is correct and much more precise  
   upvoted 1 times
- ✉️  **mrejay** 1 year, 6 months ago  
looks good  
   upvoted 3 times
- ✉️  **EK1986** 1 year, 6 months ago  
In exam 04.02.2022  
   upvoted 2 times

## Question 6

You need to process CompanyB's order.

What should you do?

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

Answer: A

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

✉  **hubsi** 6 months ago

**Selected Answer: A**

Answer A is correct. Company B is just asking for the price.

   upvoted 2 times

✉  **taddy786** 11 months, 2 weeks ago

Correct

   upvoted 1 times

✉  **Marchi26** 1 year ago

What is the correct answer?

   upvoted 1 times

✉  **EK1986** 1 year, 6 months ago

In exam 04.02.2022

   upvoted 1 times

## Question 7

You need to enter information about VendorZ into the system.

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

NOTE: Each correct selection is worth one point.

- A. Update the contact preference for VendorZ.
- B. Create a new connection type.
- C. Create an account record for VendorZ.
- D. Update the contact preference for CompanyD.
- E. Create a sub-contact record for the vendor for CompanyD.

Answer: BC

✉  **EK1986** 1 year, 6 months ago

In exam 04.02.2022

   upvoted 1 times

✉  **mrejay** 1 year, 6 months ago

correct

   upvoted 1 times

✉  **JoeS007** 1 year, 8 months ago

What bothers me is that VendorZ is already associated with Contoso, so I would think there would already be an account record.

   upvoted 1 times

 **Pirozhok** 4 months ago

I am not sure if they have them as an account...who knows how they manage suppliers.

   upvoted 1 times

✉  **AlMind** 1 year, 9 months ago

This is correct as this is an odd relationship that should be managed via connections.

   upvoted 1 times

## Question 8

You need to add the unfavorable credit and reference check reasons to the RFQ close process.

What should you do?

- A. Delete the RFQ Lead record.
- B. Create custom status reasons.
- C. Convert the credit and reference activities to an opportunity.
- D. Add a stage to the business process flow.
- E. Create custom activities for the credit and reference checks.

Answer: B

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

✉ **EK1986** 1 year, 6 months ago

In exam 04.02.2022

Like Share Upvote 1 times

✉ **mrejay** 1 year, 6 months ago

correct

Like Share Upvote 2 times

✉ **JoeS007** 1 year, 8 months ago

The statement says: "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". I would think the answer is to create an activity.

Like Share Upvote 1 times

✉ **SalvolAV** 1 year, 4 months ago

yes, but not a "custom" activity. You should create the new status reason and, when necessary, create a phone call activity as follow up.

Like Share Upvote 1 times

## Question 9

You need to implement the time study.

What should you create?

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

Answer: C

<https://docs.microsoft.com/en-us/dynamics365/customerengagement/on-premises/basics/work-with-activities?view=op-9-1>

✉️ **Candy2002** 10 months, 2 weeks ago

Selected Answer: C

A custom activity can provide start date & end date, a time-study can build on this.

👍 🔍 📈 upvoted 1 times

✉️ **EK1986** 1 year, 6 months ago

In exam 04.02.2022

👍 🔍 📈 upvoted 1 times

✉️ **loulou2105** 1 year, 8 months ago

Why not D?

👍 🔍 📈 upvoted 2 times

✉️ **SalvolAV** 1 year, 4 months ago

I don't see how data step can help to track time. C is probably the best option here

👍 🔍 📈 upvoted 1 times

✉️ **Candy2002** 10 months, 2 weeks ago

Yes, custom activity can provide start date & end date, which we can calculate the time spent on the process.

👍 🔍 📈 upvoted 1 times

# Question 10

HOTSPOT -

You need to implement sales lost to competitors.

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

NOTE: Each correct selection is worth one point.

Hot Area:

## Answer Area

Requirement	Action
Add the type of loss.	<ul style="list-style-type: none"><li>Modify the Status Reason option set.</li><li>Modify the Forecast category option set.</li><li>Modify the Close Opportunity option set.</li><li>Modify the Opportunity Status option set.</li></ul>
Record the loss for forecasting.	<ul style="list-style-type: none"><li>Modify the Opportunity Forecast Category Mapping Process workflow.</li><li>Modify the Opportunity Sales Process business process flow.</li><li>Modify the Opportunity Close form.</li></ul>

ET User:

Modify Close Opportunity option set. / Modify the Status Reason option set.

Modify the Opportunity Forecast Category Mapping Process workflow.

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

<https://syncratec.com/how-to-set-up-a-dynamics-365-sales-forecast-model-part-1/>

✉ **DJ26** Highly Voted 1 year, 11 months ago

I think that the first answer is. Modify Close opportunity option set, because opportunity Status option set fields are: In Progress and On-Hold. The second answer is correct.

upvoted 7 times

✉ **ceejaybee** 1 year, 2 months ago

No Opp Status values are Open/Won/Lost. Opp Status Reason is In Progress/On Hold (on Opp form, the Status Reason field is labelled Status - very confusing)

upvoted 1 times

✉ **ceejaybee** Most Recent 1 year, 2 months ago

I think first answer is "Modify Status Reason" as Status Reason field is always used to give further detail to the Status field. It's not "Opportunity Status", those values are for overall status; it's not "Close Opportunity optionset", as that isn't a field (that answer seems to be broadly referring to the Status Reason field on Opportunity Close entity)

upvoted 4 times

✉ **Candy2002** 10 months, 4 weeks ago

I am thinking the same idea too. The Opportunity Status must be Lost, I don't think we should change that. Instead, we can modify / add more status reason. The current status reason for Lost is Canceled / Out-Sold

upvoted 4 times

✉ **Stanna** 1 year, 5 months ago

<https://syncratec.com/how-to-set-up-a-dynamics-365-sales-forecast-model-part-1/>

upvoted 1 times

✉ **EK1986** 1 year, 6 months ago

In exam 04.02.2022

upvoted 1 times

ET Answer:

## Answer Area

Requirement	Action
Add the type of loss.	<ul style="list-style-type: none"><li>Modify the Status Reason option set.</li><li>Modify the Forecast category option set.</li><li>Modify the Close Opportunity option set.</li><li>Modify the Opportunity Status option set.</li></ul>
Record the loss for forecasting.	<ul style="list-style-type: none"><li>Modify the Opportunity Forecast Category Mapping Process workflow.</li><li>Modify the Opportunity Sales Process business process flow.</li><li>Modify the Opportunity Close form.</li></ul>

## Question 11

You need to resolve the issue for PreferredCustomerA.

What should you create?

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

Answer: C

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

✉️  **Tiiaho0** 5 months, 4 weeks ago

in exam 20.02.2022

   upvoted 1 times

✉️  **Ram0883** 7 months, 2 weeks ago

any explanation from any one here ?

   upvoted 1 times

## Question 12

HOTSPOT -

You need to manage existing RFQs.

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

NOTE: Each correct selection is worth one point.

Hot Area:

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

Answer: 第一个有争议

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

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

✉️ **AndreaDP** Highly Voted 1 year, 7 months ago

My thoughts on this: first question should be A. If you have an opportunity for multiple products to be sold over different countries you must have multiple price lists one for each country. Then it is healthy to have one quote for each country so you can associate the quote with the relative price list of that country. I don't see how you can achieve this with one single quote for a single opportunity.

👍👎FLAG upvoted 5 times

✉️ **ceejaybee** 1 year, 2 months ago

I think the given answer of B is ok, as it seems they are generating quotes from opportunities; they could either create an opp for each country for CustomerB and then the quote; or create one opp for CustomerB (add pricelist for the country, add product, change pricelist for next country, add product) and then a quote. Either way, the quote is coming off of the opp

👍👎FLAG upvoted 3 times

✉️ **ChandanKC** Most Recent 1 year, 9 months ago

Please can someone explain the answer?

👍👎FLAG upvoted 1 times

✉️ **Candy2002** 10 months, 2 weeks ago

For 1, I think it is A, because the shipping location will be one and only. It is better to create for different countries, so that we can help the business flow. For 2, it is B, because the price / discontinued product will not update until you make changes of the quote. For 3, it is A because it needs for Canadian plant, it suppose to use the price list of Canada. The step should be "Revise" quote, change the currency, then change the price list, delete the old product item. By changing the currency itself, cannot help the whole process. So I would say A is more suitable for the whole process.

👍👎FLAG upvoted 2 times

# Solution Challenge

## Question 1 2 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.

A. Solution: Use Dynamics 365 AI for Sales.

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

C. Solution: Use Unified Interface apps.

Answer: 可能是 C/B, 有争议

The correct answer is **C. Solution: Use Unified Interface apps.** As a Dynamics 365 for Sales system customizer, you can use Unified Interface apps to set up LinkedIn Sales Navigator Lead (member profile) on the Lead form. Two flavors of LinkedIn Sales Navigator controls are available and can be placed on any desktop Unified Interface application form <sup>1</sup>. You can configure your forms to show more than one control at the same time. The LinkedIn Sales Navigator Lead control shows information about a LinkedIn member profile <sup>1</sup>. Is there anything else you would like to know? 😊

A 的评论, ET 给的 N

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

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

✉️ **Daggen** Highly Voted 3 years, 11 months ago  
<https://docs.microsoft.com/en-us/dynamics365/customer-engagement/linkedin/install-sales-navigator>  
👍 ↗️ 💬 upvoted 9 times

✉️ **Rachha** Highly Voted 3 years, 2 months ago  
No

LinkedIn Sales Navigator Lead (member profile): Shows information about a LinkedIn member profile using a specific lead or contact name.  
LinkedIn Lead Lookup Control: Shows member profile information using the name of the primary contact related to the record.  
LinkedIn Sales Navigator Account (company profile): Shows information about a LinkedIn company profile using a specific account name.  
LinkedIn Account Lookup Control: Shows company profile information using the account name related to the record.

LinkedIn InMail Control: Shows a form where you can send an InMail message to another LinkedIn member.

👍 ↗️ 💬 upvoted 7 times

✉️ **Vin22CRM** Most Recent 1 month, 3 weeks ago  
Answer is No  
👍 ↗️ 💬 upvoted 1 times

- ✉ **just\_a\_user\_tryna\_make\_it** 3 months, 3 weeks ago  
ANYONE GOT LATEST FREE DUMPS FOR MB-210 AND MB-230?  
 upvoted 2 times
- ✉ **McLOvin** 3 months, 2 weeks ago  
Would like to receive these aswell. I just did the MB-910 and have to complete 210 this friday  
 upvoted 1 times
- ✉ **Caax** 1 year, 5 months ago  
**Selected Answer: B**  
Answer B  
 upvoted 2 times
- ✉ **Joana** 1 year, 6 months ago  
**Selected Answer: B**  
In exam. Answer is B.  
 upvoted 2 times
- ✉ **takshak007** 1 year, 8 months ago  
passed exam, and labs was simple. just click  
 upvoted 1 times
- ✉ **Sabineka** 1 year, 8 months ago  
Do you have the remaining exam questions? All the questions and testcases are locked now  
 upvoted 1 times
- ✉ **Tanky19** 1 year, 9 months ago  
passed exams today 60% questions came but there is a new lab section with 9 questions  
 upvoted 2 times
- ✉ **jkaur** 2 years, 6 months ago  
Answer is B.  
 upvoted 1 times
- ✉ **niru22** 2 years, 7 months ago  
In exam  
 upvoted 1 times
- ✉ **VISHALM** 3 years, 1 month ago  
In Exam. Answer is correct  
 upvoted 2 times
- ✉ **sanharshu7** 3 years, 2 months ago  
LinkedIn Sales Navigator Lead (member profile): Shows information about a LinkedIn member profile using a specific lead or contact name.  
LinkedIn Lead Lookup Control: Shows member profile information using the name of the primary contact related to the record.  
LinkedIn Sales Navigator Account (company profile): Shows information about a LinkedIn company profile using a specific account name.  
LinkedIn Account Lookup Control: Shows company profile information using the account name related to the record.  
LinkedIn InMail Control: Shows a form where you can send an InMail message to another LinkedIn member.  
 upvoted 3 times
- ✉ **NeerajAgrawal** 3 years, 1 month ago  
LinkedIn Sales Navigator Lead (member profile) is the answer.  
 upvoted 2 times
- ✉ **Mario1982** 3 years, 4 months ago  
The answer is B  
 upvoted 2 times
- ✉ **saadnadir** 3 years, 5 months ago  
B, the answer is : Add the LinkedIn Sales Navigator Contact (member profile) control.  
 upvoted 1 times
- ✉ **lucasbusquier** 3 years, 5 months ago  
Add the LinkedIn Sales Navigator Lead (member profile) control.  
 upvoted 5 times
- ✉ **Preety** 3 years, 6 months ago  
in exam  
 upvoted 2 times
- ✉ **Galypb** 3 years, 6 months ago  
It's necessary to enable CRM Sync in Sales Navigator  
 upvoted 1 times

✉ ned 3 years, 6 months ago

Answer : B

<https://docs.microsoft.com/en-us/dynamics365/linkedin/install-sales-navigator>

👍 ↗️ 🏷️ upvoted 3 times

B 的评论，ET 给的 Y，大部分用户选的 N

<https://business.linkedin.com/sales-solutions/sales-navigator-customer-hub/resources/crm-sync-dynamics-technical-guide>

✉ MAKHUNXA Highly Voted 3 years, 7 months ago

Ans should be NO - Add the LinkedIn Sales Navigator Lead (member profile) control NOT THE Contact control.  
👍 ↗️ 🏷️ upvoted 23 times

✉ LucaV6 Highly Voted 3 years, 9 months ago

Really doesn't looks like exist a LinkedIn Sales Navigator Contact (member profile) control but exist LinkedIn Sales Navigator Lead (member profile) control which show informations about a Contact  
<https://docs.microsoft.com/en-us/dynamics365/linkedin/add-sales-navigator-controls-forms>

👍 ↗️ 🏷️ upvoted 14 times

✉ s\_weisz 3 years, 8 months ago

So would the answer be No ?  
👍 ↗️ 🏷️ upvoted 1 times

✉ maximn1384 3 years, 8 months ago

Looks like No is the answer  
👍 ↗️ 🏷️ upvoted 7 times

✉ Vin22CRM Most Recent 1 month, 3 weeks ago

Ans is NO  
👍 ↗️ 🏷️ upvoted 1 times

✉ Asadipour 2 months, 3 weeks ago

Selected Answer: B  
Answer should be NO  
👍 ↗️ 🏷️ upvoted 1 times

✉ ramberry 3 months, 2 weeks ago

Selected Answer: A  
Answer is Yes  
👍 ↗️ 🏷️ upvoted 1 times

✉ ramberry 3 months, 2 weeks ago

Sorry. It's actually No (B) the control is actually called LinkedIn Sales Navigator Lead (member profile)  
👍 ↗️ 🏷️ upvoted 1 times

✉ utk22 10 months, 2 weeks ago

Selected Answer: B  
No use the LinkedIn Sales Navigator Lead (member profile) control  
👍 ↗️ 🏷️ upvoted 2 times

✉ takshak007 1 year, 8 months ago

<https://docs.microsoft.com/en-us/dynamics365/linkedin/add-sales-navigator-controls-forms>  
👍 ↗️ 🏷️ upvoted 1 times

✉ Samuele 1 year, 9 months ago

Selected Answer: B  
doesn't looks exist a LinkedIn Sales Navigator Contact (member profile) control  
👍 ↗️ 🏷️ upvoted 3 times

✉ Lemppy 2 years, 4 months ago

It's B, also because the controls are on the forms (Account, Contact, Lead, Opportunity) by default and only need to be made visible:

"System customizers will see the new LinkedIn controls in Account, Contact, Lead, and Opportunity form editors. However, the visibility for these controls is turned off by default and users won't be able to see them on forms unless the feature is enabled by a system administrator."  
👍 ↗️ 🏷️ upvoted 2 times

✉ Jpb99 2 years, 6 months ago

The answer is A - the question refers to the contact control. On the lead you can define this by using the company (account) or last name (contact) field. The question is a typo though and should be updated.  
👍 ↗️ 🏷️ upvoted 2 times

✉ jkaur 2 years, 6 months ago

Answer is B.  
👍 ↗️ 🏷️ upvoted 1 times

✉️  **Zoidberg4** 2 years, 7 months ago

What do you guys think about this question? Is it kind of typo or MS really wants to catch us by replacing "Lead" to "Contact" in "LinkedIn Sales Navigator Lead (member profile)" ? I guess A is correct answer, they just meant "set up control in field properties". And there are two question items with the same question but with different variants and this one is the most appropriate I think

   upvoted 2 times

✉️  **KevH** 2 years, 9 months ago

Hear is the options according to the link

Take your pick, I am going for LinkedIn Sales Navigator Lead (member profile)

There are different types of LinkedIn controls which are added automatically when using the latest version of the out-of-box integrations:

LinkedIn Sales Navigator Lead (member profile): Shows information about a LinkedIn member profile using a specific lead or contact name.

LinkedIn Lead Lookup Control: Shows member profile information using the name of the primary contact related to the record.

LinkedIn Sales Navigator Account (company profile): Shows information about a LinkedIn company profile using a specific account name.

LinkedIn Account Lookup Control: Shows company profile information using the account name related to the record.

LinkedIn InMail Control: Shows a form where you can send an InMail message to another LinkedIn member.

   upvoted 1 times

✉️  **Nader1996** 2 years, 11 months ago

We don't have something called LinkedIn Sales Navigator 'Contact' (member profile).

This can be done by adding: LinkedIn Sales Navigator Lead (member profile).

The answer is B

   upvoted 1 times

✉️  **Ayeenm** 3 years ago

Answer is B

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

   upvoted 1 times

✉️  **jit55** 3 years ago

Answer is No. LinkedIn Sales Navigator Contact (member profile) control does not exist.

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

   upvoted 1 times

✉️  **DaneP** 3 years, 1 month ago

I think the answer is correct.A

<https://business.linkedin.com/sales-solutions/sales-navigator-customer-hub/resources/crm-sync-dynamics-technical-guide>

The site states that it displays contact information on the lead page of crm.

   upvoted 2 times

✉️  **rshukla\_np** 3 years, 1 month ago

LinkedIn Sales Navigator Lead (member profile): Shows information about a LinkedIn member profile using a specific lead or contact name.

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

   upvoted 1 times

✉️  **Rachha** 3 years, 2 months ago

No

1.LinkedIn Sales Navigator Lead control: last name (primary), first name, email, job title, company name, and more fields from LinkedIn

2.LinkedIn Sales Navigator Account control: company name (primary), company website, and more fields from LinkedIn

   upvoted 1 times

✉️  **abhishekpan** 3 years, 2 months ago

The answer would be 'No' . sys admin needs to enable LinkedIn Sales Navigator from Advance Settings refer <https://docs.microsoft.com/en-us/dynamics365/linkedin/install-sales-navigator>

   upvoted 1 times

✉️  **emregulcan** 3 years, 3 months ago

Ths correct answer should be "NO" (option B), because there is no custom control named "LinkedIn Sales Navigator Contact (member profile) control".

Correct control's name is "LinkedIn Sales Navigator Lead (member profile)" depending on <https://docs.microsoft.com/en-us/dynamics365/linkedin/add-sales-navigator-controls-forms#add-sales-navigator-controls-to-a-form>

   upvoted 1 times

✉️  **Tr35** 3 years, 4 months ago

The answer is B

   upvoted 1 times

✉️  **Mario1982** 3 years, 4 months ago

The answer is B

   upvoted 2 times

✉️  **shalemperez** 3 years, 5 months ago

<https://docs.microsoft.com/en-us/dynamics365/linkedin/install-sales-navigator>

   upvoted 1 times

✉️  **saadnadir** 3 years, 5 months ago

B, the answer is : Add the LinkedIn Sales Navigator Contact (member profile) control.

   upvoted 1 times

I mean A

   upvoted 1 times

- ✉️👤 **Preety** 3 years, 6 months ago  
I think, answer should be NO.  
As there are only 2 controls available LinkedIn Sales Navigator Account(member profile) control and LinkedIn Sales Navigator Lead(member profile) control  
👍👎FLAG upvoted 4 times
- ✉️👤 **Preety** 3 years, 6 months ago  
in exam  
👍👎FLAG upvoted 1 times
- ✉️👤 **Daggen** 3 years, 11 months ago  
<https://docs.microsoft.com/en-us/dynamics365/customer-engagement/linkedin/install-sales-navigator>  
👍👎FLAG upvoted 1 times

## C 的评论，ET 给的 N，用户五五开

- ✉️👤 **Rachha** 3 years, 2 months ago  
Moreover,  
System customizers will see the new LinkedIn controls in Account, Contact, Lead, and Opportunity form editors. However, their default visibility is turned OFF and end users will not be able to see these controls on the forms unless the feature is enabled by a system administrator. Customizers can remove these controls from the pages as they would remove any control in case they find it too distracting.  
👍👎FLAG upvoted 1 times
- ✉️👤 **Rachha** 3 years, 2 months ago  
No  
Using Unified Interface apps will not automatically add the LinkedIn Sales Navigator controls to your form. You need to add the LinkedIn Sales Navigator Lead (member profile) control to your lead form.  
👍👎FLAG upvoted 1 times
- ✉️👤 **emregulcan** 3 years, 3 months ago  
I think correct answer should be "YES". Because you need to use Unified Interface to add/use LinkedIn Sales Navigator Controls.  
And also "System Customizer" security role can do this (I consider LinkedIn Sales Navigator already installed)  
👍👎FLAG upvoted 2 times
- ✉️👤 **burntsecondary** 3 years, 3 months ago  
The answer is B, no question about it. Using Unified Interface apps will not automatically add the LinkedIn Sales Navigator controls to your form. You need to add the LinkedIn Sales Navigator Lead (member profile) control to your lead form.  
<https://docs.microsoft.com/en-us/dynamics365/linkedin/add-sales-navigator-controls-forms>  
👍👎FLAG upvoted 2 times
- ✉️👤 **Houses** 3 years, 4 months ago  
System customizer can't install LinkedIn sales navigator. Must be system administrator  
👍👎FLAG upvoted 2 times
- ✉️👤 **Tr35** 3 years, 4 months ago  
The answer is A  
👍👎FLAG upvoted 2 times
- ✉️👤 **Mario1982** 3 years, 4 months ago  
The answer is A  
👍👎FLAG upvoted 2 times
- ✉️👤 **saadnadir** 3 years, 5 months ago  
B, the answer is : Add the LinkedIn Sales Navigator Contact (member profile) control.  
👍👎FLAG upvoted 1 times
- ✉️👤 **Nath** 3 years, 4 months ago  
Right answer is : Add the LinkedIn Sales Navigator Lead (member profile) control.  
👍👎FLAG upvoted 1 times
- ✉️👤 **Preety** 3 years, 6 months ago  
in exam  
👍👎FLAG upvoted 1 times
- ✉️👤 **mlea626** 3 years, 6 months ago  
I think the correct answer should be true...  
<https://docs.microsoft.com/en-us/dynamics365/linkedin/integrate-sales-navigator>  
👍👎FLAG upvoted 2 times
- ✉️👤 **mlea626** 3 years, 6 months ago  
What would the correct answer be?  
👍👎FLAG upvoted 1 times
- ✉️👤 **Galypb** 3 years, 6 months ago  
I think B  
👍👎FLAG upvoted 2 times
- ✉️👤 **Daggen** 3 years, 11 months ago  
<https://docs.microsoft.com/en-us/dynamics365/customer-engagement/linkedin/install-sales-navigator>  
👍👎FLAG upvoted 1 times

## Question 4 5 6 7

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

After you answer a question 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.

A. Solution: Change the currency decimal precision and currency display options.

B. Solution: Change the currency code and symbol so that both are displayed.

C. Solution: Change the default currency.

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

Answer: A, D 有大争议

The correct answer is A. Solution: Change the currency decimal precision and currency display options. This will allow the company to round all currency values to four decimal places and display the correct currency symbol. Is there anything else you would like to know? 😊

A 的评论, ET 给的 Y

<https://neilparkhurst.com/2019/02/25/mb-210-microsoft-dynamics-365-for-sales-currencies>

<https://docs.microsoft.com/en-us/power-platform/admin/manage-transactions-with-multiple-currencies>

chawk [Highly Voted] 3 years, 4 months ago

yes, agreed the answer is A. See image in currency setup section, both are Currency precision and Currency symbol are system level setups when configuring a currency in Dynamics 365: <https://neilparkhurst.com/2019/02/25/mb-210-microsoft-dynamics-365-for-sales-currencies> also, in Microsoft docs: <https://docs.microsoft.com/en-us/power-platform/admin/manage-transactions-with-multiple-currencies>

upvoted 12 times

Preety [Highly Voted] 3 years, 6 months ago

A is correct answer  
upvoted 6 times

Vin22CRM [Most Recent] 1 month, 3 weeks ago

Selected Answer: A  
Correct  
upvoted 1 times

christosp619 1 year, 5 months ago

Selected Answer: A  
Correct  
upvoted 1 times

Dynamicsbro 1 year, 9 months ago

Answer is A. That's how to do it.  
upvoted 1 times

- ✉ **Mischa** 2 years, 1 month ago  
The answer is No. If a company moves its HQ to Europe, it will wish to change its Base Currency to EUR. Base Currency cannot be deleted and cannot be changed. CRM must be reinstalled.  
 upvoted 3 times
- ✉ **Kyol** 1 year, 6 months ago  
The question is not about changing base currency. It is about precision and display. So the answer is correct.  
 upvoted 2 times
- ✉ **ShawM** 2 years ago  
Are you sure?  
 upvoted 1 times
- ✉ **jkaur** 2 years, 6 months ago  
A is right  
 upvoted 1 times
- ✉ **Harish1509** 2 years, 8 months ago  
The Answer is correct. Under power platform admin, currency setting, you can select both symbol and precision  
 upvoted 1 times
- ✉ **bbhworld** 2 years, 11 months ago  
the answer is YES  
 upvoted 1 times
- ✉ **NanaKe** 2 years, 11 months ago  
Answer is YES I've just tested : My default currency is euro, so I went in >> System >> Business Management>> Currencies I selected "Euro" and I changed the symbol by \$ instead of €, then I went to my personal settings to be sure the Euro was selected as my default currency and in the lookup it was "Euro, EUR, \$". then I created a new opportunity record, and the currency was the Euro (the one I had chosen) but when I added products the price was 10\$ and not 10€. So to my surprise it worked..  
 upvoted 4 times
- ✉ **KevH** 2 years, 9 months ago  
Agreed. Answer is "Yes"  
 upvoted 1 times
- ✉ **jit55** 3 years ago  
Answer is Yes. The base currency cannot be deleted and cannot be changed. Although you can revise some details such as precision, display name and symbol.  
 upvoted 4 times
- ✉ **sammilee285** 2 years, 11 months ago  
Then shouldn't the answer be No? The solution option was currency precision and currency display options. Not currency precision and currency symbol  
 upvoted 2 times
- ✉ **sammilee285** 2 years, 11 months ago  
Currency display options is in System Settings > General and it allows you to choose to display the currencies using either Currency symbol or Currency code - this does not mean you are changing the symbol or "displaying the correct currency symbol" as the question asks  
 upvoted 2 times
- ✉ **KevH** 2 years, 9 months ago  
Agree with jit55. The answer is yes, I have just completed this exercise in a Trial version of D365 Sales  
 upvoted 2 times
- ✉ **isbou** 3 years ago  
In configuration we can edit symbol and precision even for base currency. But this isn't going to affect the precision of any existing data but new one. For me the question is ambiguous and I would respond No if I consider existing data. Yes for I consider new one.  
 upvoted 1 times
- ✉ **VISHALM** 3 years, 1 month ago  
In Exam. Answer is correct  
 upvoted 1 times
- ✉ **Rachha** 3 years, 2 months ago  
Yes, both currency precision and currency symbol can be changed  
 upvoted 4 times
- ✉ **Mario1982** 3 years, 4 months ago  
The answer is A tested  
 upvoted 1 times
- ✉ **Sh4z** 3 years, 5 months ago  
The answer is yes because you can change both in system settings  
 upvoted 1 times
- ✉ **[Removed]** 3 years, 6 months ago  
The answer should be "No". Currency precision can be set at system level, but currency symbol is a personal setting, to be set per user. Finally.. base currency of an organization is not possible to change. CRM must be reinstalled, if the desire is to change the base currency.  
 upvoted 2 times
- ✉ **Galyb** 3 years, 6 months ago  
The answer is NO, because Opportunities in course with quotes are not changed in cascade. Besides the currency precision is not necessary the same of the field.  
 upvoted 1 times

- ✉ **Preety** 3 years, 6 months ago  
In exam  
 upvoted 2 times
- ✉ **dacooo** 3 years, 6 months ago  
the answer is No because the currency symbol is not edited by Currency Precision  
 upvoted 1 times
- ✉ **dacooo** 3 years, 6 months ago  
\*\*read it wrong, the answer is correct  
 upvoted 1 times

B 的评论，ET 给的 N

<https://neilparkhurst.com/2019/02/25/mb-210-microsoft-dynamics-365-for-sales-currencies/>

- ✉ **dacooo** **Highly Voted** 3 years, 6 months ago  
B - Settings --> Administration --> System Settings --> General Tab --> Set the Currency display Option  
 upvoted 11 times
- ✉ **Vin22CRM** **Most Recent** 1 month, 3 weeks ago  
**Selected Answer: B**  
Ans is No  
 upvoted 1 times
- ✉ **Kate1406** 7 months, 1 week ago  
**Selected Answer: B**  
B is correct answer - changing the currency code and symbol will only change how the currency is represented in text form  
 upvoted 2 times
- ✉ **gabrielle\_123** 1 year, 5 months ago  
**Selected Answer: B**  
N/A....  
 upvoted 1 times
- ✉ **jkaur** 2 years, 6 months ago  
B is answer  
 upvoted 2 times
- ✉ **Harish1509** 2 years, 8 months ago  
Changing currency code will not change the precision value, so answer is no if i understood the question correctly  
 upvoted 3 times
- ✉ **isbou** 3 years ago  
No  
The currency code is read only  
 upvoted 1 times
- ✉ **Rachha** 3 years, 2 months ago  
No,  
Reason -the currency code cannot be changed  
 upvoted 3 times
- ✉ **Gus23** 3 years, 2 months ago  
<https://neilparkhurst.com/2019/02/25/mb-210-microsoft-dynamics-365-for-sales-currencies/>  
 upvoted 1 times
- ✉ **Preety** 3 years, 6 months ago  
In Exam  
 upvoted 1 times
- ✉ **Vikash** 3 years, 6 months ago  
answer is correct  
 upvoted 4 times

## C 的评论，ET 给的 N

- ✉ **Subodh** **Highly Voted** 3 years, 7 months ago  
Default currency can't be changed. Answer is correct.  
👍 ↪ ⚡ upvoted 14 times
- ✉ **Vin22CRM** **Most Recent** 1 month, 3 weeks ago  
Obvious NO  
👍 ↪ ⚡ upvoted 1 times
- ✉ **christosp619** 1 year, 5 months ago  
**Selected Answer: B**  
Can't change default currency  
👍 ↪ ⚡ upvoted 1 times
- ✉ **jkaur** 2 years, 6 months ago  
B is right.  
👍 ↪ ⚡ upvoted 2 times
- ✉ **Rachha** 3 years, 2 months ago  
No  
Changing the default currency precision and symbol wont change precision and symbol of all other currencies  
👍 ↪ ⚡ upvoted 3 times
- ✉ **Preety** 3 years, 6 months ago  
In exam  
👍 ↪ ⚡ upvoted 2 times

## D 的评论，ET 给的 Y，用户选 YN 的都有

<https://docs.microsoft.com/en-us/dynamics365/project-operations/sales/sales-currency>

- ✉ **Samuele** **Highly Voted** 1 year, 9 months ago  
**Selected Answer: B**  
Creating a new currency does not solve the rounding for all currencies.  
👍 ↪ ⚡ upvoted 6 times
- ✉ **Gurushanthamurthy** **Highly Voted** 2 years, 4 months ago  
Agree with answer A  
👍 ↪ ⚡ upvoted 5 times
- ✉ **Asadipour** **Most Recent** 3 weeks, 3 days ago  
**Selected Answer: A**  
The answer is A.  
People who've voted for B, do you have any other solution for this scenario?  
👍 ↪ ⚡ upvoted 1 times
- ✉ **Vignesh\_271120** 4 months, 2 weeks ago  
**Selected Answer: B**  
Creating a new currency does not change the currency display option.  
👍 ↪ ⚡ upvoted 1 times
- ✉ **No\_Doubt** 5 months, 3 weeks ago  
**Selected Answer: B**  
Should be "Change the currency decimal precision and currency display options" instead.  
👍 ↪ ⚡ upvoted 2 times
- ✉ **EgycrmDev** 1 year, 1 month ago  
**Selected Answer: A**  
Agree with A  
👍 ↪ ⚡ upvoted 1 times

 **d365ppp** 1 year, 1 month ago

Selected Answer: A

<https://docs.microsoft.com/en-us/dynamics365/project-operations/sales/sales-currency>

   upvoted 1 times

 **SashM** 1 year, 4 months ago

Selected Answer: A

A is correct

   upvoted 1 times

 **javiercheke** 1 year, 7 months ago

This is the question number four

   upvoted 2 times

 **niyazuki** 1 month, 4 weeks ago

The scenario is the same as in question #4, but given solution is different. Solution in question #4 is correct, the solution here is wrong.

Commenting because your information might be misleading to some people.

   upvoted 1 times

 **SKpl200** 2 years, 2 months ago

Correct answer is B - creating a new currency does not solve the rounding for all currencies.

   upvoted 3 times

 **MeThisIs** 2 years, 2 months ago

creating the currency is only part one of the answer... the other two steps make the whole answer correct - correct answer is Yes (A)

   upvoted 11 times

 **Moppu** 2 years, 4 months ago

This question matters entirely on whether the past currency values for records need to be changed as well. This is a poorly worded question, however since they are moving to Europe now, all the records using this currency will be new, so I agree with this answer - Yes.

   upvoted 1 times

 **Dean0918** 2 years, 5 months ago

answer should be no.

there are similar problems like No.4, if you add a new one, how about the old ones? abandon them?

   upvoted 2 times

 **BenJames** 2 years, 9 months ago

Why do you need to add a new currency?

   upvoted 1 times

 **eneboi** 2 years, 9 months ago

that's if the currency doesn't exist in dynamics 365

   upvoted 2 times

 **BenJames** 2 years, 9 months ago

Understood but the question states moving from USA to Europe, which both currencies already exist in D365 so why would the answer be Yes and a new currency be needed?

   upvoted 3 times

 **IhateThisNickname** 2 years, 8 months ago

Maybe because not everybody in Europe uses the euro? But normally shouldn't all 180 currencies in the world already be in Dynamics?

   upvoted 2 times

 **vpearson** 2 years, 7 months ago

I'd have to agree with you guys... I don't see a reason why a "new" currency would be needed. Even if we were to pretend that they need a new currency for whatever reason, the question specifically mentions configuring only two of the 5 mandatory fields. I vote no for the answer.

   upvoted 3 times

 **RandomUser** 2 years, 7 months ago

Because the exam question write is from the US and he has no clue that D365 has most non-US currencies on board?

   upvoted 3 times

## Question 8 9 10 11

**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.

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

B. Solution: On the last stage of the business process flow, select Finish.

C. Solution: Change the opportunity to an inactive state.

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

Answer: B

The correct answer is B. Solution: On the last stage of the business process flow, select Finish. This will ensure that the business process flow duration values are calculated for all Dynamics 365 opportunities, even if some opportunities are closed before the business process flow durations are calculated. Is there anything else you would like to know? 😊

A 的评论, ET 给的 N

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

✉ iThem **Highly Voted** 3 years, 5 months ago

Subodh Trust yourself, brother.

I Saw several comments you added, I think the most important is to know how it works, not to copy just the right answer

👍 ↗️ 🎉 upvoted 38 times

✉ Theodhora **Highly Voted** 3 years, 7 months ago

"Duration" field on the Business Process Entity will only be populated once the process has been either completed (i.e user clicks on Finish on last stage of the process) or aborted (i.e. user clicks Abandon from the Process button options on the ribbon).

For the active processes (i.e. when opportunity is closed as Won or Lost), that column will be empty:

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

👍 ↗️ 🎉 upvoted 17 times

✉ Subodh 3 years, 7 months ago

So, is B the correct answer?

👍 ↗️ 🎉 upvoted 3 times

✉ HassanSarhan 2 years, 1 month ago

Good explanation Thanks!

👍 ↗️ 🎉 upvoted 1 times

✉ Rkaur **Most Recent** 1 year, 6 months ago

Its incorrect. No is the Answer. simply closing without finishing the BPF wont calculate duration

👍 ↗️ 🎉 upvoted 1 times

✉ SKpl200 2 years, 2 months ago

Answer is No.

👍 ↗️ 🎉 upvoted 3 times

✉  **meriadoc71** 2 years, 5 months ago

In my opinion the answers are:

- Abandon the bpf
- Finish the bpf

About Close as Won changing the state of record does not update the duration on the bpf entity

   upvoted 3 times

✉  **Preety** 3 years, 6 months ago

in Exam

   upvoted 4 times

## B 的评论, ET 给的 Y

✉  **Vin22CRM** 1 month, 3 weeks ago

**Selected Answer: A**

Yes right

   upvoted 1 times

✉  **grp12** 1 year, 2 months ago

Correct Answer, on exam May-2022

   upvoted 1 times

✉  **pumpkin2** 1 year, 5 months ago

On exam March 2022

   upvoted 1 times

✉  **CaaX** 1 year, 5 months ago

**Selected Answer: A**

Correct A

   upvoted 1 times

✉  **Cyriharsh** 2 years, 1 month ago

Correct.

   upvoted 2 times

✉  **HassanSarhan** 2 years, 1 month ago

Yes. "Duration" field on the Business Process Entity will only be populated once the process has been either completed or aborted. For the active processes, that column will be empty.

   upvoted 2 times

✉  **jkaur** 2 years, 6 months ago

Correct

   upvoted 2 times

✉  **fasa** 3 years, 2 months ago

Correct

   upvoted 2 times

✉  **Sh4z** 3 years, 5 months ago

Correct

   upvoted 3 times

## C 的评论, ET 给的 N

✉  **Preety**  3 years, 6 months ago

B is correct answer

   upvoted 6 times

✉  **Preety**  3 years, 6 months ago

in exam

   upvoted 5 times

✉  **Vin22CRM**  1 month, 3 weeks ago

**Selected Answer: B**

Ans is NO

   upvoted 1 times

✉  **pumpkin2** 1 year, 5 months ago

On exam March 2022

   upvoted 2 times

✉  **jkaur** 2 years, 6 months ago

Correct

   upvoted 1 times

## D 的评论, ET 给的 Y, 用户选的 N

✉️ 🚩 **JudT** 2 months ago

The answer is B as you will not get the finish button at any stage except in the final stage of the BPF

👍 ↪️ 🏆 upvoted 2 times

✉️ 🚩 **Asadipour** 2 months, 2 weeks ago

**Selected Answer: B**

cspx97 is right. The Finish button is only available in the final step! At any stage, you should select Abandon to meet the goal! The answer is B.

👍 ↪️ 🏆 upvoted 1 times

✉️ 🚩 **ceejaybee** 1 year, 2 months ago

In exam, Jun-22

👍 ↪️ 🏆 upvoted 1 times

✉️ 🚩 **Gosainsnehal** 1 year, 3 months ago

**Selected Answer: B**

When pressed Finish, it will calculate the duration for the opportunity. And it will be only available when Close stage is active. So Answer is No.

👍 ↪️ 🏆 upvoted 3 times

✉️ 🚩 **cspx97** 1 year, 3 months ago

B. Finish button is only available in the final stage

👍 ↪️ 🏆 upvoted 4 times

## Question 12 13 14

**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.

- A. Solution: Create a subscription to Microsoft Relationship Sales and enable JavaScript and pop-up blockers.
- B. Solution: Create a subscription to Microsoft Relationship Sales, enable JavaScript, and disable pop-up blockers.
- C. Solution: Remove any subscriptions associated with Microsoft Relationship Sales and disable JavaScript.

Answer: B

The correct answer is B. Solution: Create a subscription to Microsoft Relationship Sales, enable JavaScript, and disable pop-up blockers. This will ensure that the controls for using automated conversation starters are available to developers in Dynamics 365 Sales. Is there anything else you would like to know? 😊

A 的评论, ET 给的 N

- ✉  **WASSIM2020**  2 years, 9 months ago

Correct, you should activate Dynamics 365 AI for Sales in Dynamics 365 Admin Center

   upvoted 13 times
- ✉  **Dean0918** 2 years, 5 months ago

Agree. Thanks a lot!

   upvoted 1 times
- ✉  **digitalyash86**  1 month, 3 weeks ago

Please can anyone provide the source of info.

   upvoted 1 times
- ✉  **Don\_George** 2 years, 5 months ago

JavaScript is not necessary, that's why the solution is ruled out

   upvoted 1 times
- ✉  **jkaur** 2 years, 6 months ago

Correct

   upvoted 1 times

B 的评论，ET 给的 Y, YN 都有人选

<https://docs.microsoft.com/en-us/learn/modules/value-proposition-mrss/2-mrss-benefits>

<https://docs.microsoft.com/en-us/dynamics365/linkedin/install-sales-navigator>

✉ **JoeS007** **Highly Voted** 1 year, 8 months ago

The answer is correct. The subscription to MRS requires LinkedIn Sales Navigator. LSN requires JavaScript enabled and pop-up blocker disabled.  
"https://docs.microsoft.com/en-us/learn/modules/value-proposition-mrss/2-mrss-benefits" and "https://docs.microsoft.com/en-us/dynamics365/linkedin/install-sales-navigator"

thumb up 11 times

✉ **chaxta** **Highly Voted** 2 years, 6 months ago

Still No!

thumb up 10 times

✉ **HassanSarhan** 2 years, 1 month ago

Agree with you

thumb up 2 times

✉ **ShaheerCh** **Most Recent** 2 months, 3 weeks ago

chatgpt said "NO"

thumb up 1 times

✉ **MsSana** 9 months, 3 weeks ago

Correct..

You'll need to enable JavaScript in your browser.

You'll need to disable your pop-up blocker for the Dynamics 365 domain.

thumb up 1 times

✉ **javiercheke** 1 year, 7 months ago

need someone to review repeated questions

thumb up 4 times

✉ **mazen111** 1 year, 5 months ago

it isn't repeated there is a difference in wording "disable pop-up blockers"

thumb up 3 times

✉ **jkaur** 2 years, 6 months ago

correct

thumb up 1 times

✉ **VaibhavA** 2 years, 8 months ago

How the answer to same question Q39 above is No

thumb up 3 times

✉ **Deimt** 2 years, 8 months ago

Actually they are not the same if you compare the parts: "Enable Javascript AND pop-up blockers" vs. "Enable Javascript, disable pop-up blockers"

thumb up 4 times

✉ **Shehroz** 2 years, 8 months ago

Q no 39 says,

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

and Q no 40 says

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

There is a difference of enable and disable pop up blockers

thumb up 8 times

C 的评论，ET 给的 N

✉ **Eirikafe** **Highly Voted** 1 year, 10 months ago

Correct, this is the furthest you can be from accomplishing the task at hand.

thumb up 5 times

## Question 15 16 17 18

**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.

A. Solution: Create a Power Automate flow to track the activities.

B. Solution: Enable auditing on for the Playbook Activity entity.

C. Solution: Enable the playbook in Playbook settings.

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

Answer: D

The correct answer is D. **Solution: Edit the playbook template and set the value of the Track Progress option to yes.** If the playbook template used for the playbook has its Track progress field set to Yes, the activities are created under a playbook record that is under the calling record. If the Track progress field is set to No, the activities are created directly under the calling record . Is there anything else you would like to know? 😊

A 的评论，ET 给的 N

Activity tracking is enabled in the Playbook template.

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

✉  **inka11** 2 months, 3 weeks ago

Starting July 7, 2023, the playbooks feature will be deprecated region-wise.

   upvoted 2 times

✉  **ceejaybee** 1 year, 2 months ago

In exam, Jun-22

   upvoted 1 times

✉  **Meetya** 1 year, 10 months ago

On exam

   upvoted 1 times

✉  **lakshmig** 2 years, 1 month ago

it doesn't. hence the answer is NO. enabling activity tracking will meet the requirement.

   upvoted 4 times

✉  **szkiel** 2 years, 2 months ago

Why does it meet the requirements?

   upvoted 1 times

B 的评论，ET 给的 N，没有有效评论

□  **inka11** 2 months, 3 weeks ago

Starting July 7, 2023, the playbooks feature will be deprecated region-wise.

   upvoted 1 times

□  **ceejaybee** 1 year, 2 months ago

In exam, Jun-22

   upvoted 1 times

□  **Meetya** 1 year, 10 months ago

On exam

   upvoted 1 times

C 的评论，ET 给的 N

□  **Pieter741** 2 months ago

Playbook will be deprecated in july 2023

   upvoted 1 times

□  **ceejaybee** 1 year, 2 months ago

In exam, Jun-22

   upvoted 1 times

□  **Meetya** 1 year, 10 months ago

On exam

   upvoted 1 times

□  **lakshmi9** 2 years, 1 month ago

NO is the answer. enabling activity tracking will do the trick , not auditing

   upvoted 3 times

□  **Ross22** 2 years, 2 months ago

All No, because on Track Progress set to Yes will work.

"If the playbook template used for the playbook has its Track progress field set to Yes, the activities are created under a playbook record that is under the calling record."

   upvoted 3 times

D 的评论，ET 给的 Y

□  **zxc1234** 1 year ago

must edit the playbook template

   upvoted 1 times

□  **ceejaybee** 1 year, 2 months ago

In exam, Jun-22

   upvoted 1 times

□  **Meetya** 1 year, 10 months ago

On exam

   upvoted 2 times

## Question 19 20 21 22

**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.

A. 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 under each territory and select the postal codes applicable for each territory.

B. 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.

C. 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.

D. Solution:

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

Answer: A

The correct answer is A. 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 under each territory and select the postal codes applicable for each territory. To set up territories in Dynamics 365 Sales, you can create a territory record for each territory, add the manager and members, and then associate the postal codes for each state to the corresponding territory. Is there anything else you would like to know? 😊

A 的评论, ET 给的 Y

<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>

✉️ **KendraK** Highly Voted 1 year, 10 months ago

Postal Codes is part of Field Service but this is a Sales exam. By default you can't associate Postal Codes unless you have Field Service.

👍 ↗️ 🏴️ upvoted 6 times

✉️ **Newb007** 3 days, 13 hours ago

also it says Manager not ManagerS. "Create the West territory, add the manager, and save." requirement was 2 managers... small detail that might be a typo but ya.. just to confuse things further there is that. Your welcome

👍 ↗️ 🏴️ upvoted 1 times

✉️ **Newb007** 3 days, 11 hours ago

disregard... lol I read the question very wrong  
👍 ↗️ 🏴️ upvoted 1 times

✉️ **Kratinhos** Most Recent 1 year, 3 months ago

On exam 27/4/22. Passed. I selected Yes

👍 ↗️ 🏴️ upvoted 2 times

✉️ **pumpkin2** 1 year, 5 months ago

On exam March 2022

👍 ↗️ 🏴️ upvoted 2 times

✉️ **Meetya** 1 year, 10 months ago

On exam, but I think without the sentence:  
"Select Related under each territory and select the postal codes applicable for each territory."

👍 ↗️ 🏴️ upvoted 2 times

B 的评论, ET 给的 N

✉️ **Kratinhos** 1 year, 3 months ago

On exam 27/4/22. Passed. I selected same answer

👍 ↗️ 🏴️ upvoted 2 times

✉️ **Meetya** 1 year, 10 months ago

On exam

👍 ↗️ 🏴️ upvoted 1 times

C 的评论, ET 给的 N

✉️ **Kratinhos** 1 year, 3 months ago

On exam 27/4/22. Passed. I selected same answer

👍 ↗️ 🏴️ upvoted 2 times

✉️ **pumpkin2** 1 year, 5 months ago

On exam March 2022

👍 ↗️ 🏴️ upvoted 2 times

✉️ **Meetya** 1 year, 10 months ago

On exam

👍 ↗️ 🏴️ upvoted 2 times

D 的评论, ET 给的 N

✉️ **SharjeelButt** Highly Voted 1 year ago

☛ Create the West territory and add the manager.

☛ Add members and save.

☛ Repeat for the Central and East territories.

Missing fourth step: Relate each territory to the postal code(s)

👍 ↗️ 🏴️ upvoted 5 times

## Question 23 24 25 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.

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

The customer is now ready to complete the purchase.

You need to create a quote from the opportunity.

A. Solution: Close the opportunity as won.

B. Solution: Convert the Opportunity to a quote.

C. Solution: Qualify the opportunity.

D. Solution: On the Quotes tab of the opportunity, select Add New Quote.

E. Solution: Qualify the opportunity. 出现两次

Answer: D

The correct answer is D. Solution: On the Quotes tab of the opportunity, select Add New Quote. In Dynamics 365 Sales, you can create a quote from an opportunity by going to the Quotes tab of the opportunity and selecting Add New Quote. This will create a new quote record that is associated with the opportunity and pre-populate the quote with information from the opportunity. Is there anything else you would like to know? 😊

A 的评论, ET 给的 N

<https://docs.microsoft.com/en-us/dynamics365/customer-engagement/developer/convert-opportunity-quote-sales-order-invoice>

✉️ 🚩 **Zeus6** Highly Voted 2 years, 9 months ago

Pressing 'Close as Won' does not automatically create a Quote. You need to create the Quote (from within the Opportunity) before pressing that button, therefore, answer is correct - B

👍 ↗️ 💬 upvoted 10 times

✉️ 🚩 **Kratinhos** Most Recent 1 year, 3 months ago

On exam 27/4/22. Passed. I selected same answer

👍 ↗️ 💬 upvoted 1 times

✉️ 🚩 **Srinibala** 2 years, 1 month ago

B is correct Answer

👍 ↗️ 💬 upvoted 1 times

✉️ 🚩 **Rachha** 3 years, 1 month ago

b

When leaving the opportunity as won, natively you cannot create a quote from the opportunity.

👍 ↗️ 💬 upvoted 2 times

✉️ 🚩 **iThem** 3 years, 5 months ago

404 - Page not found

Hmm, we couldn't find this link, but here are some related search results that may be helpful.

Link under the answer not available

👍 ↗️ 💬 upvoted 1 times

- ✉️👤 **Preety** 3 years, 6 months ago  
In exam  
👍👎FLAG upvoted 3 times
- ✉️👤 **Subodh** 3 years, 7 months ago  
As per following link..  
<https://docs.microsoft.com/en-us/dynamics365/customerengagement/on-premises/developer/convert-opportunity-quote-sales-order-invoice>  
"If an opportunity is won, you may convert it to a quote, or to a sales order or an invoice."
- Then why not answer is A. Yes.
- I think answer is yes.  
👍👎FLAG upvoted 2 times
- ✉️👤 **Marduk** 3 years, 6 months ago  
The answer is B.  
The link you indicate is associated with development, not something functional.  
When leaving the opportunity as won, natively you cannot create a quote from the opportunity.  
👍👎FLAG upvoted 12 times
- ✉️👤 **ElTonton76** 2 years, 3 months ago  
you can convert, but it does not mean closing as won converts it so it is not sufficient  
👍👎FLAG upvoted 2 times

## B 的评论，ET 给的 Y，用户选的 N

- ✉️👤 **Zeus6** **Highly Voted** 2 years, 9 months ago  
This is badly worded as there is no 'convert' button or action - as a user, you simply find the Quotes subgrid area within the Opportunity and create Quote from that Opportunity - but answer is correct - Yes  
👍👎FLAG upvoted 26 times
- ✉️👤 **loulou2105** 1 year, 8 months ago  
So why should it be "yes" if it's not possible?  
👍👎FLAG upvoted 2 times
- ✉️👤 **ceejaybee** 1 year, 2 months ago  
Does indeed seem to be Yes. The MS Docs url reference given repeatedly states "convert Opportunity to Quote" even though this isn't really what happens  
👍👎FLAG upvoted 1 times
- ✉️👤 **m\_k1** 1 year, 4 months ago  
Question #34Topic 2 has the answer of 'Create new quote from Opportunity'  
👍👎FLAG upvoted 1 times
- ✉️👤 **Bialix** **Highly Voted** 2 years, 2 months ago  
Opportunity is not converting to quote since opportunity can have N quotes. In my opinion this should be "No".  
👍👎FLAG upvoted 12 times
- ✉️👤 **ShawM** 2 years ago  
I agree with you, but if this question is a prank?  
👍👎FLAG upvoted 3 times
- ✉️👤 **Possumus** **Most Recent** 1 year, 1 month ago  
**Selected Answer: B**  
There is no convert button to action.  
👍👎FLAG upvoted 1 times
- ✉️👤 **Kratinhos** 1 year, 3 months ago  
On exam 27/4/22. Passed. I selected (B) No  
👍👎FLAG upvoted 3 times
- ✉️👤 **ceejaybee** 1 year, 2 months ago  
Unless you scored 100% in the exam overall, you don't know whether you got individual answers correct?  
👍👎FLAG upvoted 10 times
- ✉️👤 **SashM** 1 year, 4 months ago  
**Selected Answer: A**  
Seems like A is correct.  
👍👎FLAG upvoted 1 times
- ✉️👤 **MissSam** 1 year, 5 months ago  
I guess it is A in a long way: "If an opportunity is won, you may convert it to a quote, or to a sales order or an invoice."  
👍👎FLAG upvoted 1 times
- ✉️👤 **christosp619** 1 year, 5 months ago  
**Selected Answer: B**  
Answer is No.  
Correct answer is at Question #34Topic 2.  
Converting an Opportunity can only be done by code.  
👍👎FLAG upvoted 5 times

- ✉ **Dean0918** 2 years, 5 months ago  
should be no. you could not convert to quote, and later Question #19 is yes.  
👍 ↪ ⚡ upvoted 7 times
- ✉ **in\_panic** 2 years, 6 months ago  
You can't convert, so the answer is no  
👍 ↪ ⚡ upvoted 5 times
- ✉ **WASSIM2020** 2 years, 9 months ago  
you can create a quote automatically from opportunity when you change stage of PBF to propose stage  
<https://docs.microsoft.com/en-us/learn/modules/manage-opportunities-dynamics-365-sales/4-opportunity-management-lifecycle>  
👍 ↪ ⚡ upvoted 3 times
- ✉ **ad3791** 2 years, 2 months ago  
yes but that doesn't convert the entire oppy into a quote, it just creates the quote and the opportunity still exists just as before  
👍 ↪ ⚡ upvoted 1 times
- ✉ **szkielet** 2 years, 2 months ago  
I don't see that functionality  
👍 ↪ ⚡ upvoted 1 times

<https://docs.microsoft.com/en-us/learn/modules/manage-opportunities-dynamics-365-sales/4-opportunity-management-lifecycle>

C 的评论, ET 给的 N

- ✉ **Kratinhos** 1 year, 3 months ago  
On exam 27/4/22. Passed. I selected same answer  
👍 ↪ ⚡ upvoted 1 times

- ✉ **Don\_George** 2 years, 5 months ago  
The answer is B  
👍 ↪ ⚡ upvoted 2 times

- ✉ **Don\_George** 2 years, 5 months ago  
You must created a Quote first  
👍 ↪ ⚡ upvoted 1 times

- ✉ **ponzuk** 2 years, 5 months ago  
B is correct  
👍 ↪ ⚡ upvoted 2 times

D 的评论, ET 给的 Y

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

- ✉ **mucil** **Highly Voted** 2 years, 3 months ago  
Correct  
👍 ↪ ⚡ upvoted 6 times

- ✉ **lakshmig** **Most Recent** 2 years, 1 month ago  
agree with the answer given  
👍 ↪ ⚡ upvoted 2 times

- ✉ **ponzuk** 2 years, 5 months ago  
Answer is correct  
👍 ↪ ⚡ upvoted 3 times

E 的评论, ET 给的 N

□  **Subodh**  3 years, 7 months ago

Answer B should be correct. there is no button to qualify the opportunity

   upvoted 6 times

□  **HassanEid9090** 3 years, 6 months ago

correct

   upvoted 2 times

□  **Rachha**  3 years, 1 month ago

Answer B(NO) is correct ans

   upvoted 2 times

□  **kadek** 3 years, 5 months ago

Answer is correct

   upvoted 2 times

□  **Preety** 3 years, 6 months ago

In exam

   upvoted 2 times

## Question 28 29 30 31

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

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

You configure forecasts for a clothing manufacturer.

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

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

A. Proposed solution: Recalculate the forecast.

B. Proposed solution: Update the roll-up recurrence frequency.

C. Proposed solution: Update the Opportunity Forecast Category Mapping process.

D. Proposed solution: Recalculate the opportunity.

Answer: A

The best way for the salesperson to refresh the forecast is to recalculate the forecast (Option A). This will update the forecast with the latest information from the opportunity. Updating the roll-up recurrence frequency (Option B) or updating the Opportunity Forecast Category Mapping process (Option C) would not directly refresh the forecast. Is there anything else you would like to know? 😊

A 的评论, ET 给的 Y

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

✉️  **mrejay** 1 year, 7 months ago

Correct

   upvoted 2 times

✉️  **zukito3** 1 year, 8 months ago

Correct

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

   upvoted 3 times

B 没扒到评论, ET 给的 N

C 的评论, ET 给的 N

  **mrejay** 1 year, 7 months ago

Correct. Answer should be: Recalculate the forecast.

   upvoted 4 times

D 的评论, ET 给的 N

  **mrejay** 1 year, 7 months ago

Correct. Answer is: Recalculate the forecast.

   upvoted 2 times

# Common Question 1

## Question 1

DRAG DROP -

You use Dynamics 365 Sales.

You are in stage two of a 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	Answer Area	Scenario	Action
Abandon and then Switch		End the current process and start the correct business process flow.	Action
Finish and then Switch		Temporarily leave the current process for a different business flow.	Action
Switch			Action

ET User:

Abandon and then Switch

Switch

<https://neilparkhurst.com/2016/11/06/dynamics-365-business-process-flows/>

✉  **vicerico**  1 year, 10 months ago

It cannot be finish because you are in Stage 2/5. You can only finish a BPF in the last stage.

Therefore, first question is Abandon and Switch

   upvoted 22 times

✉  **zukito3** 1 year, 10 months ago

I agree with you, I tried in a solution and the only option to saw is the Abandoned option, not the finish

   upvoted 4 times

✉  **Kratinhos**  1 year, 3 months ago

On exam 27/4/22. Passed. I selected

Abandon and then Switch

Switch

   upvoted 6 times

✉  **Vin22CRM**  1 month, 3 weeks ago

1. Abandon & Switch

2. Switch

   upvoted 1 times

✉  **Neil1998\_CE** 2 months, 1 week ago

On exam 06/06/23.

   upvoted 2 times

✉  **Ayadhs** 4 months, 2 weeks ago

First Option should be "Abandon and Switch"

   upvoted 1 times

✉  **No\_Doubt** 6 months ago

Abandon and then Switch

We are at stage 2 of a 5 stages process, we need to end the process and switch to another concurrent process.

It is possible to abandon a process. Meaning you can halt a process at any point. This might be useful in lots of circumstances. I can image, for example, wanting to abandon a lead qualification process at any stage in the business process flow.

   upvoted 2 times

✉  **taddy786** 11 months, 3 weeks ago

1. Abandon & Switch

2. Switch

   upvoted 1 times

✉  **JoeS007** 1 year, 8 months ago

I think it should be "Abandon & Switch", and "Switch"

   upvoted 2 times

✉  **dpinlaguna** 1 year, 9 months ago

1. Abandon & Switch

2. Switch

<https://neilparkhurst.com/2016/11/06/dynamics-365-business-process-flows/>

   upvoted 4 times

✉  **Univega** 1 year, 10 months ago

The question was on the exam 12.10.2021.

   upvoted 2 times

✉  **Cyriharsh** 2 years, 1 month ago

Why not Abandon?

   upvoted 5 times

✉  **cleitonjose** 2 years ago

Because if you abandon the BPF status changes to inactive

   upvoted 5 times

ET Answer:

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

## Question 2

You work for a company using Dynamics 365 for Sales.

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

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

What should you do?

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

Answer: B, 争议, 部分人选 C, 部分人选 BC

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

✉ Konsti **Highly Voted** 3 years, 5 months ago

Hi B should be the right one. Because the question is about quotes. If i change the suffix it will apply to all records like cases etc. If i change prefix, it applies only to selected record.

1 like 1 reply 1 upvoted 23 times

✉ createscript **Highly Voted** 3 years, 6 months ago

Changing the suffix length applies to all auto-numbered entities - just tried it. If you change suffix from 6 to 4 then this applies to Cases, Quotes, Orders, the lot. This is of course what you might want. Changing the prefix only changes the letters for the entity concerned (as they are all different). The offline/online issue is a bit of a red herring: the suffix is applied whether online or offline but is simply there to assure AutoNumber uniqueness in the event that two new records (one of them offline) try to pull the same next number from the sequence.

1 like 1 reply 1 upvoted 11 times

✉ Wisenut **Most Recent** 2 years, 2 months ago

Though B and C both results in reducing the length by two characters, changing Prefix only impacts that entity where as changing suffix impacts all entities and this is not mentioned as an ask in the question. Hence the answer needs to Prefix

1 like 1 reply 1 upvoted 3 times

✉ jkaur 2 years, 6 months ago

Reduce the prefix to one character, will be answered(B), as if we reduce suffix length it automatically apply to all entities(Lead, Opportunity etc.)

1 like 1 reply 1 upvoted 2 times

✉ Sanctum 2 years, 6 months ago

I would go with B since it says the minimum possible length. The prefix can be shortened to one character but the suffix can be shortened to 4 numbers. So, the prefix will give us the minimum possible length.

1 like 1 reply 1 upvoted 1 times

✉ Harish1509 2 years, 8 months ago

Answer B is correct because there if you change the suffix, it would be applicable to all the record types but prefix will not change for all record types so prefix can be changed. So please lock answer B :)

1 like 1 reply 1 upvoted 2 times

✉ KevH 2 years, 9 months ago

In the event that you have more than 9999 quotes, which is possible in some organisations, then the suffix would have to be more than 4. Therefore reducing the prefix seems the sensible answer. So when I sit the exam soon, and if it comes up, I will choose "B" reduce the prefix

1 like 1 reply 1 upvoted 1 times

✉ Ashvel 2 years, 10 months ago

The answer is specifically stating the auto number prefix which cannot be changed, not the prefix as text, thus in my opinion the answer should be C.

1 like 1 reply 1 upvoted 1 times

✉  **Ashvel** 2 years, 10 months ago

The answer is specifically stating the auto number prefix which cannot be changed, not the prefix as text, thus in my opinion the answer should be C.

   upvoted 1 times

✉  **Ashvel** 2 years, 10 months ago

Sorry the answer specifically mentions\*

   upvoted 1 times

✉  **Ashvel** 2 years, 10 months ago

Please ignore my comment. I read the question wrong.

   upvoted 3 times

✉  **light24** 2 years, 10 months ago

Settings > Administration > Auto-Numbering - Quote

Here only TWO things you can change.

Prefix -- text field -- which is max 3 char

Suffix -- drop down -- 4, 5 & 6 chars

If you reduce prefix to 1 char - you can reduce at most 2 Characters

If you reduce suffix to 4 - you can reduce at most 2 Characters

So, both the answers B & C are technically correct and equivalent.

BUT -- if you go by sensible mind -- you should choose C -- set the suffix to 4 char

Because, suffix is a random alpha numeric number

   upvoted 3 times

✉  **requisite20** 2 years, 10 months ago

Answer is C

   upvoted 1 times

✉  **RaviAjugiya** 2 years, 11 months ago

Settings > Administration > Auto-Numbering - Quote. Answer is C. You can't change prefix for Quote number.

   upvoted 2 times

✉  **sammlee285** 2 years, 11 months ago

You can change the prefix (I reduced the QUO prefix to Q) - have you even tested this out in the solution?

   upvoted 3 times

✉  **KevH** 2 years, 9 months ago

Agreed, yes you can

   upvoted 1 times

✉  **Rachha** 3 years, 2 months ago

B correct answer

   upvoted 1 times

✉  **abhishekpan** 3 years, 2 months ago

Both B and C can be solution. Prefix is max 3 characters and suffix is max 6 characters. So ideally both B and C results in reducing 2 characters .. But between 2 B is more preferred option as for C if you reduce suffix to 4 characters you will lose unique reference number after 9999 quotes where as Choosing B will allow you to generate unique numbers till 999999 quotes Refer <https://neilparkhurst.com/2019/02/25/mb-210-microsoft-dynamics-365-for-sales-auto-numbering/>

   upvoted 2 times

✉  **iamdelta4** 3 years, 2 months ago

The correct answer is C. Technically, both B and C will reduce the quote number to 14 characters. However, if we reduce the suffix length to four characters, the customer will have to remember only the last 4 characters. The first 10 characters are same on all the quotes.

   upvoted 2 times

✉  **sammlee285** 2 years, 11 months ago

The question does not ask for the complexity of the quote ID, only to shorten it. Ideally you don't want to reduce the suffix because as Shine commented above, the prefix is fixed so to maximise allowing the system to cater for the most number of quote records is to reduce the fixed component and keep the suffix as is (more permutations and combinations available with the suffix length at 6)

   upvoted 1 times

✉  **Tr35** 3 years, 2 months ago

The correct answer is C. You cannot change the autonumbering. You can change only prefix and suffix length.

   upvoted 1 times

✉  **RaghunathAnipeddi** 3 years, 2 months ago

Answer is B. Why B? As per the question shortens quite number to the minimum possible length. We can reduce the prefix or suffix length. But, as per the answers B has prefix to one character(Minimum) and C has suffix length to four(Maximum). So my view is to go with B.

   upvoted 1 times

✉  **Neo11** 3 years, 2 months ago

Option B & C are the tricky ones.

B. Reduce the auto number prefix to one character -> its about auto number which is correct.

C. Reduce the suffix length to four characters -> no context given here so it seems not correct.

Therefore, B is the correct answer.

   upvoted 2 times

- ✉ [Removed] 3 years, 3 months ago  
Answer could be both B and C as you can change both in the Auto Numbering menu for quotes.  
However, B would be more effective in the business sense.  
B. Reduce the auto number prefix to one character  
👍👎💡 upvoted 1 times
- ✉ ned 3 years, 6 months ago  
B and C both are correct because the end result will end up having the quote length with same number of characters i.e. 11  
👍👎💡 upvoted 1 times
- ✉ Preety 3 years, 6 months ago  
Related question was there in exam, so better to read the supportive documentation  
👍👎💡 upvoted 2 times
- ✉ CRMGURU 3 years, 6 months ago  
In this blog, step 5 says that suffix is only used when you're working offline. So I believe B is correct. <https://docs.microsoft.com/en-us/power-platform/admin/change-auto-number-prefix-contract-case-article-quote-order-invoice-campaign-category-knowledge-articles>  
👍👎💡 upvoted 3 times
- ✉ Yogeshwar 3 years, 8 months ago  
B&C sounds correct but If you have to choose only one option than B as The suffix is used for records that were created while you were offline.  
<https://docs.microsoft.com/en-us/power-platform/admin/change-auto-number-prefix-contract-case-article-quote-order-invoice-campaign-category-knowledge-articles>  
👍👎💡 upvoted 3 times
- ✉ MAKHUNXA 3 years, 7 months ago  
but it still uses 6 chars in the suffix, whether it's online or offline.  
👍👎💡 upvoted 2 times
- ✉ shine 3 years, 9 months ago  
I believe B was chosen because you can't say for sure you will not get over 9999 quotes, so shortening the prefix is a safer option.  
But I agree, B or C could be correct.  
👍👎💡 upvoted 4 times
- ✉ Benjamin 3 years, 9 months ago  
It could be B or C. The option allows you to configure a prefix of between 1-3 characters and a suffix of between 4-6 characters. Both are enabled by default and cannot be disabled. I believe that the real question would have been "Which 2 of the following...". So long as you know that I believe that you'll be fine.  
👍👎💡 upvoted 8 times
- ✉ ejb 3 years, 6 months ago  
B cause " The suffix is used for records that were created while you were offline and for which the number can't be guaranteed to be unique."  
<https://docs.microsoft.com/en-us/power-platform/admin/change-auto-number-prefix-contract-case-article-quote-order-invoice-campaign-category-knowledge-articles>  
👍👎💡 upvoted 4 times
- ✉ svema 4 years, 2 months ago  
I thing that, !C. Reduce the suffix length to four characters" is the correct answer.  
👍👎💡 upvoted 4 times
- ✉ MAKHUNXA 3 years, 7 months ago  
Reducing the prefix to 1 or Suffix to 4 is same (2 chars reduction), so B can also be the correct ans. However, if it's matter of reducing size, better remove from Suffix, changing prefix may cause inconsistencies.  
👍👎💡 upvoted 1 times

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

Bing: B

To shorten quote numbers to the minimum possible length in Dynamics 365 for Sales, you should reduce the auto number prefix to one character <sup>1</sup>. This will help make the quote numbers shorter and easier for customers to provide when they call the company. Is there anything else you would like to know? 😊

## Question 3

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 automatically 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	Answer Area
Requirement	Action
Create a business process flow	
Create a child workflow	Action
Create a real-time workflow	Action

ET User:

Create a real-time workflow

Create a real-time workflow

To ensure that the marketing manager automatically receives an email each time an email request is sent to sales@contoso.com, you should create a real-time workflow. A real-time workflow is a type of workflow that runs immediately, in response to a specific event or change in the system. In this case, you can configure the real-time workflow to trigger when an email is sent to sales@contoso.com, and then send an email to the marketing manager as part of the workflow's actions. So, the correct answer is: Create a real-time workflow. Is there anything else you would like to know?

 **szkiele** Highly Voted  2 years, 2 months ago

Why not used in both - create real-time workflow?

   upvoted 14 times

 **Wisenum** Highly Voted  2 years, 2 months ago

Since there is no customization the answer needs to be Child Work Flow for both the cases.

   upvoted 9 times

 **Newb007** Most Recent  4 days, 11 hours ago

THE ANSWER IS CORRECT FELLAS

   upvoted 1 times

 **No\_Doubt** 6 months ago

Since a real-time workflow is already created and links the lead to the email received.

We create a child workflow with two steps:

1- Create email

2- Send email

Now we update the real-time workflow and call the child workflow responsible for sending email to the marketing manager.

   upvoted 2 times

- ✉️ MarioArias9 1 year, 2 months ago  
Real time is already set up as the trigger in the lead creation. Create an email and send it are both child flows from the first one.  
👍👎💡 upvoted 1 times
- ✉️ Kratinhos 1 year, 3 months ago  
On exam 27/4/22. Passed. I selected Real time workflow  
Child workflow  
👍👎💡 upvoted 3 times
- ✉️ Gosaisnehal 1 year, 5 months ago  
Create a Child workflow for both.  
👍👎💡 upvoted 2 times
- ✉️ inscho 6 months, 3 weeks ago  
Well, it states that the lead is created by a (business) rule. To fulfil with the next requirement "create an email" you would need a real time workflow.  
👍👎💡 upvoted 2 times
- ✉️ tobban 1 year, 6 months ago  
on exam 19.01.2022  
👍👎💡 upvoted 2 times
- ✉️ prpr3 1 year, 6 months ago  
What was your answer?  
👍👎💡 upvoted 2 times
- ✉️ lakshmig 2 years, 1 month ago  
anyone got latest mb 210 dump as in june 2021?  
👍👎💡 upvoted 4 times
- ✉️ kapilsingla27 2 years, 2 months ago  
Anyone got mb-230 and mb-220 dumps as i failed by 10marks  
👍👎💡 upvoted 2 times
- ✉️ dkdeveloper 2 years, 8 months ago  
Why it is not a BPF instead of a real time work flow?  
👍👎💡 upvoted 1 times
- ✉️ sbaptis 2 years, 6 months ago  
Because a business process flow is a different type of flow to orchestrate the actions of a process such as "Lead to Deal" or "Case to Resolution".  
👍👎💡 upvoted 5 times
- ✉️ [Removed] 2 years, 8 months ago  
In Exam  
👍👎💡 upvoted 4 times

ET Answer:

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

Bing:

To ensure that the marketing manager automatically receives an email each time an email request is sent to sales@contoso.com, you should create a **real-time workflow**<sup>1</sup>. This will allow you to configure the rule to automatically send an email to the marketing manager each time an email request is sent to sales@contoso.com. Is there anything else you would like to know? 😊

To ensure that the marketing manager automatically receives an email each time an email request is sent to sales@contoso.com, you should create a **real-time workflow**. This will allow you to configure the rule to automatically send an email to the marketing manager each time an email request is sent to sales@contoso.com. Is there anything else you would like to know? 😊

## Question 4

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 £. 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

Answer: A

To fix the currency symbol for the sales manager in Dynamics 365, you should change the default currency in personal options. Personal options allow each user to customize their own settings, including the default currency. This means that if the sales manager changes their default currency in personal options, it will only affect their own view and not other users. So, the correct answer is A. Change the default currency in personal options. Is there anything else you would like to know?

<https://neilparkhurst.com/2019/02/25/mb-210-microsoft-dynamics-365-for-sales-currencies/>

✉  **Mike71** Highly Voted  3 years, 6 months ago

No. the answer is A - You may set your Personal Options to use something else as a default, but a user can still change it when creating records. Users can change personal defaults in Microsoft Dynamics CRM.

   upvoted 19 times

✉  **Mario1982** Highly Voted  3 years, 4 months ago

the answer is A (tested)

   upvoted 11 times

✉  **Houses** 3 years, 4 months ago

Tested too. I'm surprised if someone can create a new record of currency and assign it to him/her self while trying to change an import....

   upvoted 2 times

✉  **Vin22CRM** Most Recent  1 month, 3 weeks ago

Selected Answer: A

No other options nearby

   upvoted 1 times

✉  **christosp619** 1 year, 5 months ago

Selected Answer: A

It's A

   upvoted 1 times

✉  **dpinlaguna** 1 year, 9 months ago

A. <https://neilparkhurst.com/2019/02/25/mb-210-microsoft-dynamics-365-for-sales-currencies/>

   upvoted 1 times

- ✉ **jkaur** 2 years, 6 months ago  
Answer is A.  
Upvoted 1 times
- ✉ **Harish1509** 2 years, 8 months ago  
Answer is A  
Upvoted 1 times
- ✉ **redfly61** 2 years, 10 months ago  
In my opinion:  
a) Can't be right because this can affect only on a new records, but in this case the manager is changing an existing record and this record already has its currency (US\$);  
b) In Settings->Currency It's possible to change the symbol, but this will affect on all the existing record, but within the question is written "Other managers are not experiencing this issue", so also this choice must be wrong;  
c) From here it's possible to change the format but not the currency symbol, moreover, also in this case the change will be applied to all records so other managers should have reported the issue;  
d) As for point c), with the Personal Option is possible to change the format but not the Currency Symbol, so also this answer seems wrong.  
I think that who wrote this question in Microsoft should be fired, but for now, we roll the dice and choose the less stupid answer, but which?  
Upvoted 2 times
- ✉ **davzi** 3 years ago  
The question is meant to say 'However, the currency symbol changes from \$ to £' I've seen it elsewhere. The answer is A.  
Upvoted 3 times
- ✉ **KevH** 2 years, 9 months ago  
Agreed  
Upvoted 1 times
- ✉ **jit55** 3 years ago  
Tested all the options and none of them worked. All options are incorrect. Goal currency always set to base currency and no multi-currency supported for goals.  
If I want to answer this question, I'll go with C as we can change base currency display options.  
Upvoted 3 times
- ✉ **Rachha** 3 years, 2 months ago  
A correct  
Upvoted 3 times
- ✉ **MojoTTV** 3 years, 2 months ago  
Answer A, I don't understand, why would someone guess the wrong answer, then post it here, to confuse people... you can't change currency symbol to . in format section, takes 1 minute to check, geez...  
Upvoted 5 times
- ✉ **HassanSarhan** 2 years, 1 month ago  
you are right thanks, A is correct  
Upvoted 1 times
- ✉ **SteveH** 3 years, 5 months ago  
On the "Format" tab in Personal Settings, the formatting of currency only changes the separators (thousands and decimal) and the position of the currency symbol, not which currency symbol is displayed. On the "General" tab in Personal Settings the Currency field is the default for all new records. Records existing before the change in Currency on Personal are unaffected. In a plain reading of the question, none of the options will have the desired result. However, option D will have no effect on the symbol displayed (just whether the symbol begins or ends the currency values).  
Option A is less incorrect than all others.  
Upvoted 9 times
- ✉ **[Removed]** 3 years, 5 months ago  
Irrespective of the correct answer A or D, this manager must be fired. How on Earth can one modify personal settings, while changing the goal for a salesperson.  
It's like that one wanted to change the password for their account, but ended up creating a quote in CRM!  
Upvoted 2 times
- ✉ **RiaanvG** 3 years, 6 months ago  
Agree D  
Upvoted 2 times
- ✉ **Stasy** 3 years, 7 months ago  
I think it is D  
Upvoted 4 times
- ✉ **Subodh** 3 years, 7 months ago  
Can anyone confirm this answer?  
Upvoted 1 times
- ✉ **sunilm2** 3 years, 6 months ago  
You can verify by comparing in Personal settings and formats. Even default currency is blank you can see symbol, so answer should be D.  
Upvoted 1 times
- ✉ **theboy** 1 year, 8 months ago  
I disagree, you cannot change the symbol of currencies in the format tab, dude.  
Upvoted 1 times

## Question 5

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

Answer: D

<https://community.dynamics.com/crm/f/microsoft-dynamics-crm-forum/159165/populate-opportunity-estimated-revenue-with-actual-revenue-from-quote?pifragment-97030=1#responses>

<https://carldesouza.com/opportunities-calculating-revenue-dynamics-365/>

<https://community.dynamics.com/365/b/d365demystified/posts/d365-quick-tip-est-revenue-calculations-on-opportunity>

✉ RiaanvG Highly Voted 3 years, 6 months ago

It is D, this is a customization option in opportunities. The answer is not referring to the opportunity front end screen.

<https://community.dynamics.com/crm/f/microsoft-dynamics-crm-forum/159165/populate-opportunity-estimated-revenue-with-actual-revenue-from-quote?pifragment-97030=1#responses>

"You can also change the default value via CRM Customization.

Go to the Opportunity form editor then go to the field, double click and edit, go to the details, edit it after that change the default value from User Provided to System Calculated."

upvoted 10 times

✉ Preety Highly Voted 3 years, 6 months ago

in Exam, D is correct answer.

But the option was not "In Opportunity", instead it was "In customization"

upvoted 9 times

✉ PallaviDumps 2 years, 10 months ago

"In customization" is correct. Or more appropriately "In Opportunity fields" wherein we have to change the default value of the option set "Revenue".

upvoted 2 times

✉ Vin22CRM Most Recent 1 month, 3 weeks ago

Selected Answer: D

Correct

upvoted 1 times

✉ inka11 3 months ago

D is the correct answer

upvoted 1 times

✉️  **Yvon** 10 months ago

Good answer is D  
<https://carldesouza.com/opportunities-calculating-revenue-dynamics-365/>  
👍 ↪️ 📈 upvoted 1 times

✉️  **Kyol** 1 year, 7 months ago

After the English test that is one of the previous questions, its assuming how poorly worded this is.  
👍 ↪️ 📈 upvoted 1 times

✉️  **javiercheke** 1 year, 7 months ago

The option field Revenue is in the Opportunity form in Product Line Items tab. D is Ok.  
👍 ↪️ 📈 upvoted 1 times

✉️  **jkaur** 2 years, 6 months ago

D is correct answer.  
👍 ↪️ 📈 upvoted 1 times

✉️  **DaneP** 3 years, 1 month ago

<https://carldesouza.com/opportunities-calculating-revenue-dynamics-365/>  
D is correct.  
👍 ↪️ 📈 upvoted 2 times

✉️  **Rachha** 3 years, 2 months ago

D Correct  
👍 ↪️ 📈 upvoted 1 times

✉️  **vickib** 3 years, 2 months ago

I swear in the test option D said "In solution" instead of In opportunity". I was looking for the "In Opportunity" option and didn't see one  
👍 ↪️ 📈 upvoted 3 times

✉️  **A\_Farooq** 3 years, 2 months ago

Answer is D,  
<https://carldesouza.com/opportunities-calculating-revenue-dynamics-365/>  
👍 ↪️ 📈 upvoted 1 times

✉️  **MarkD** 3 years, 2 months ago

Answer is D. The option \*is\* in opportunity form.  
👍 ↪️ 📈 upvoted 2 times

✉️  **Yogeshwar** 3 years, 8 months ago

<https://community.dynamics.com/365/b/d365demystified/posts/d365-quick-tip-est-revenue-calculations-on-opportunity>  
👍 ↪️ 📈 upvoted 4 times

## Question 6

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.	<ul style="list-style-type: none"><li>Select Open Views</li><li>Select Show Visual Filter</li><li>Select Show Global Filter</li></ul>
Save the dashboard filters.	<ul style="list-style-type: none"><li>Use Visual Filter</li><li>Use Global Filter</li></ul>

ET User:

1 Select Show Visual Filter

2. Use Global Filter

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

[https://rocketcrm.co.uk/dynamics365\\_interactive\\_dashboards/](https://rocketcrm.co.uk/dynamics365_interactive_dashboards/)

✉  **jkaur**  2 years, 6 months ago

[https://rocketcrm.co.uk/dynamics365\\_interactive\\_dashboards/](https://rocketcrm.co.uk/dynamics365_interactive_dashboards/)

1. Visual Filter

2. Global Filter

   upvoted 21 times

✉  **Dean0918** 2 years, 5 months ago

Thx

1. Visual Filter

2. Global Filter

   upvoted 3 times

✉  **Vin22CRM**  1 month, 3 weeks ago

1. Visual Filter

2. Global Filter

   upvoted 1 times

✉  **tobban** 1 year, 6 months ago

On exam 19.01.2022

   upvoted 1 times

✉  **HassanSarhan** 2 years, 1 month ago

Not correct.

1. Visual Filter
2. Global Filter

   upvoted 3 times

✉  **IhateThisNickname** 2 years, 9 months ago

Anybody knows if correct?

   upvoted 1 times

✉  **KevH** 2 years, 9 months ago

Just create this in my Trial environment.

Answer should be

- 1 Select Show Visual Filter
2. Use Global Filter

1. Select Show Visual Filter. 2 Use Global Filter

   upvoted 8 times

✉  **Zeus6** 2 years, 9 months ago

I agree...I can't save the filter with the Visual Filter, but i can 'save as a reusable filter' with Global Filter

1. Visual Filter
2. Global Filter

   upvoted 4 times

## Question 7

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

◀ ▶

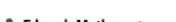
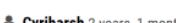
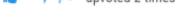
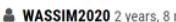
↑ ↓

Answer:

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

◀ ▶

↑ ↓

- ✉ **KevH** Highly Voted 2 years, 8 months ago  
Correct  
1. Hot Lead  
because a hot lead must be created REGARDLESS of other words mentioned. this takes precedence over anything else.  
Text in Question : Emails that specifically mention ProductA must always create a hot lead for that product regardless of other words mentioned.
2. Warm Lead  
because "buy" and "purchase" IS MORE IMPORTANT THAN "support" and "help".  
Text in Question : 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.
3. High-Priority Case  
because this has specific words to look for and Cold case is already in last place as it has no specific importance over the others.  
Text in Question : Emails that contain the words support or help must create a new high-priority case.
4. Cold Lead  
because if none of the above words are mentioned then cold lead created (self-explanatory)
- Text in Question : If none of the targeted words are present in an email, a cold lead must be created.  
 upvoted 30 times
- ✉ **EslamKhattab** Most Recent 1 year, 3 months ago  
In exam 2022  
 upvoted 1 times
- ✉ **pumpkin2** 1 year, 5 months ago  
On exam March 2022  
 upvoted 1 times
- ✉ **Gosaisnehal** 1 year, 5 months ago  
Hot lead, Warm-lead, High-priority case, cold lead  
 upvoted 1 times
- ✉ **EduardoMatheus** 1 year, 5 months ago  
In exam 24.02.2022  
 upvoted 2 times
- ✉ **Univega** 1 year, 10 months ago  
The question was on the exam 12.10.2021.  
 upvoted 1 times
- ✉ **Univega** 1 year, 10 months ago  
The question was on the exam 12.10.2021.  
 upvoted 1 times
- ✉ **Meetya** 1 year, 10 months ago  
In exam  
 upvoted 2 times
- ✉ **Gbest** 1 year, 10 months ago  
Well this might be 'correct' but its not right! Surely priority should be to current customers in need of assistance!  
 upvoted 3 times
- ✉ **digitalyash86** 1 month, 4 weeks ago  
This is because of how Auto Create rule execute the condition, if you place condition for Warm Lead or High Priority Case, the condition for Hot Lead will never be executed (but Q details mention that irrespective of other words, it should must be executed if it mentions products). Similarly, the Cold Lead condition must come to end as it should be executed only if no other condition satisfies. Between, Warm Lead and High-Priority Case, Warm Lead comes first as "The words buy and purchase are more important than support or help."  
 upvoted 1 times
- ✉ **Cyriharsh** 2 years, 1 month ago  
I think the current order of statements in the requirements are not correct - or the answers are in incorrect order. Looks like commenters below had seen a different order in the requirements than now.  
 upvoted 2 times
- ✉ **Gurushanthamurthy** 2 years, 4 months ago  
Correct  
 upvoted 1 times
- ✉ **jkaur** 2 years, 6 months ago  
Correct  
 upvoted 2 times
- ✉ **WASSIM2020** 2 years, 8 months ago  
Correct!  
 upvoted 2 times

## Question 8

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	Answer Area
Base	
Email from Microsoft Exchange	
Email engagement	
Today	
Scenario	Action card
Upcoming meeting reminder	Action card
An email is opened	Action card

Answer:

Action cards	Answer Area
Base	
Today	
Scenario	Action card
Upcoming meeting reminder	Email from Microsoft Exchange
An email is opened	Email engagement

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

<https://powerobjects.com/dynamics-365-for-sales/enable-configure-relationship-assistant/#:~:text=Follow%20the%20steps%20below%20to,Actions%20you%20wish%20to%20enable>

<https://learn.microsoft.com/en-us/dynamics365/sales/action-cards-reference>

<https://docs.microsoft.com/en-us/dynamics365/sales/assistant>

✉️  **RiaanvG**  3 years, 6 months ago

1- Email from Microsoft Exchange  
2- Email Engagement

- Base Card — It is related to the core feature of CRM-like Post-meeting follow-up, Due Today, etc.
- Cards from Exchange — It creates based on analysis of your email messages such as upcoming Meeting, Task Due Today, Missed email, etc.
- Relationship Analytics Cards — It generates based on your relationship nurturing
- Email Engagement Cards — It generates based on the engagement of your email by recipient i.e.; email opened, etc.
- Productivity Cards — About your upcoming plans, i.e.; Upcoming flight, meeting, etc.
- Today Cards — Related to your today's plans

   upvoted 14 times

✉️  **jkaur**  2 years, 6 months ago

<https://powerobjects.com/dynamics-365-for-sales/enable-configure-relationship-assistant/#:~:text=Follow%20the%20steps%20below%20to,Actions%20you%20wish%20to%20enable.>

   upvoted 9 times

✉️  **EgycrmDev** 1 year, 1 month ago

Wonderful link

Thanks

   upvoted 1 times

✉️  **midnightoil**  2 months, 1 week ago

1. Today
2. Email Engagement

   upvoted 1 times

✉️  **To\_bi** 10 months, 1 week ago

<https://learn.microsoft.com/en-us/dynamics365/sales/action-cards-reference>

   upvoted 1 times

✉️  **Stanna** 1 year, 5 months ago

<https://docs.microsoft.com/en-us/dynamics365/sales/assistant>

   upvoted 1 times

✉️  **Gurushanthamurthy** 2 years, 4 months ago

Correct

   upvoted 3 times

✉️  **jkaur** 2 years, 6 months ago

Correct.

   upvoted 1 times

✉️  **bust0** 2 years, 7 months ago

Correct!

   upvoted 1 times

✉️  **WASSIM2020** 2 years, 8 months ago

Correct answer!

   upvoted 1 times

## Question 9

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:

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

◀

▶

↑

↓

ET User:

1. Open Settings
2. Open Business Management
3. Configure Automatic record Creation and Update Rules

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

✉ [Removed] Highly Voted 2 years, 5 months ago

This is a 365 SALES exam, the answer is business management not SERVICE management  
1 upvoted 21 times

✉ sanyog7 Most Recent 2 weeks, 4 days ago

Its Service Management  
<https://learn.microsoft.com/en-us/dynamics365/customer-service/set-up-rules-to-automatically-create-or-update-records>  
1 upvoted 1 times

✉ ClaudiaP 3 weeks, 1 day ago

I checked it's in business management  
1 upvoted 1 times

✉ ClaudiaP 3 weeks, 1 day ago

it's also in service management, so both should be correct  
1 upvoted 1 times

✉ vishjust 6 months, 3 weeks ago

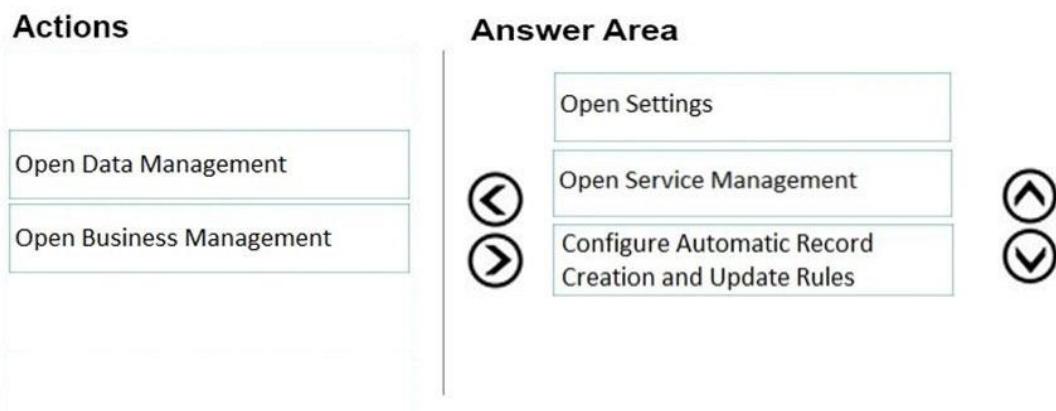
'configure automatic create and update rule' option is in "service management" so ans is correct.  
1 upvoted 1 times

✉ Luna18 1 year, 6 months ago

So, basically both Business Management and Data Management are correct, depending on which interface you're working. Business Management for the old interface and Data Management for the new one. The what would MS consider correct ?  
1 upvoted 1 times

- ✉ **Mischa** 2 years, 1 month ago  
Data Management works too in the Unified Interface (not in Classic mode).  
Upvoted 1 times
- ✉ **Mischa** 2 years, 1 month ago  
Data Management works too.  
Upvoted 1 times
- ✉ **Shivaram\_i** 2 years, 6 months ago  
Why cant we use Business Management?  
Upvoted 2 times
- ✉ **jkaur** 2 years, 6 months ago  
Correct  
Upvoted 1 times
- ✉ **monicazc025** 2 years, 8 months ago  
Correct Answer  
Upvoted 4 times
- ✉ **WASSIM2020** 2 years, 9 months ago  
Correct answer, and you can choose Open Business Management in second action  
Upvoted 3 times
- ✉ **KevH** 2 years, 9 months ago  
You can indeed :-) Brings up the same screen as selecting Service Management  
Upvoted 2 times
- ✉ **MeThisIs** 2 years, 3 months ago  
Agree - Bix Mgmt works, so is not wrong answer. the path thru Svc Mgmt brings you to the same area... odd  
Upvoted 1 times
- ✉ **Preety** **Highly Voted** 3 years, 6 months ago  
in exam, but "Service Management" was not there as an option so select "Business Management"  
Upvoted 11 times
- ✉ **mariats** **Highly Voted** 3 years, 2 months ago  
> Go to Settings  
> Business Management  
> Automatic Record Creation and the Update Rules  
Upvoted 5 times

ET Answer:



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

## Question 10

HOTSPOT -

You are a Dynamics 365 for Sales environment.

You need to implement the Social Selling Assistant.

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

NOTE: Each correct selection is worth one point.

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

ET User & Bing:

Dynamics 365 AI for Sales

Relationship Assistant

<https://www.youtube.com/watch?reload=9&v=Qi1gYnMaLQk>

<https://www.shenweb.com/blog/dynamics-365/how-to-leverage-social-selling-dynamics-365/>

<https://docs.microsoft.com/en-us/power-platform/admin/install-social-selling-assistant>

<https://docs.microsoft.com/en-us/dynamics365/social-engagement/social-selling-assistant-overview>

<https://docs.microsoft.com/en-us/learn/modules/manage-relationships-social-selling-dynamics-365-sales/4-social-selling-assistant>

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

✉ **Jonathan92** Highly Voted 3 years, 6 months ago

Dynamics 365 AI for Sales  
Relationship Assistant

👍 ↗️ 📈 upvoted 11 times

✉ **Oskarma** Most Recent 1 year, 4 months ago

In Exam 18/4/22

👍 ↗️ 📈 upvoted 1 times

✉ **NanaKe** 2 years, 11 months ago

Can anyone tell me what is the correct answer as both Social selling assistant and social engagement has been discontinued ?

👍 ↗️ 📈 upvoted 3 times

✉ **Rachha** 3 years, 2 months ago

social engagement  
search topics

👍 ↗️ 📈 upvoted 1 times

- ✉ **rrodriguez** 3 years, 3 months ago  
in Exam  
 upvoted 1 times
- ✉ **Janaxxx20** 3 years, 3 months ago  
The answers are correct. <https://www.youtube.com/watch?reload=9&v=Qi1gYnMaLQk>  
 upvoted 2 times
- ✉ **Gus23** 3 years, 2 months ago  
Agreed, it is the Search Topics option within the Social Selling Assistant, not the (Relationship) Assistant.  
 upvoted 1 times
- ✉ **zljjSteven** 3 years, 4 months ago  
<https://www.sherweb.com/blog/dynamics-365/how-to-leverage-social-selling-dynamics-365/>  
 upvoted 1 times
- ✉ **burntsecondary** 3 years, 4 months ago  
The first answer is for sure Social Engagement. The link below states you need a license for that product.  
  
<https://docs.microsoft.com/en-us/power-platform/admin/install-social-selling-assistant>
- As for the second answer Relationship Assistant seems to be the only option that would work here but I could not find a link that would definitively answer this question. Social Selling Assistant did seem to be an extension of the Relationship Assistant before it was discontinued and Assistant is an option for dashboards.  
 upvoted 2 times
- ✉ **Preety** 3 years, 6 months ago  
IN Exam  
 upvoted 2 times
- ✉ **RiaanvG** 3 years, 7 months ago  
Microsoft Social Engagement has been discontinued  
 upvoted 4 times
- ✉ **The12Anonym** 3 years, 2 months ago  
MS still has this question in the test, just did it today..  
 upvoted 2 times
- ✉ **PallaviDumps** 2 years, 11 months ago  
<https://docs.microsoft.com/en-us/power-platform/admin/install-social-selling-assistant>  
 upvoted 1 times
- ✉ **Yogeshwar** 3 years, 8 months ago  
<https://docs.microsoft.com/en-us/dynamics365/social-engagement/social-selling-assistant-overview>  
 upvoted 3 times
- ✉ **HassanSarhan** 2 years, 2 months ago  
Correct answer.  
for the first choice: Configure Microsoft Social Engagement to identify content owned by your business. Additionally, you can share social profiles with other users and configure tags that promote a certain post to users of the Social Selling Assistant.  
and the second choice: Personalize the Social Selling Assistant by choosing the search topics that are relevant for you and by adding social profiles. Optionally, share your own profiles to enable other users in your organization to post on your behalf.  
and here the reference  
<https://docs.microsoft.com/en-us/learn/modules/manage-relationships-social-selling-dynamics-365-sales/4-social-selling-assistant>  
 upvoted 7 times
- ✉ **Possumus** 1 year, 3 months ago  
On exam March 2022  
 upvoted 1 times
- ✉ **pumpkin2** 1 year, 5 months ago  
On exam March 2022  
 upvoted 1 times
- ✉ **mel28** 1 year, 8 months ago  
This was on exam as of 12/23/21 !!!  
 upvoted 3 times
- ✉ **JoeS007** 1 year, 8 months ago  
Check this out. As of July 2021 Social Engagement is discontinued: <https://docs.microsoft.com/en-us/power-platform/admin/install-social-selling-assistant>  
 upvoted 3 times
- ✉ **JoeS007** 1 year, 9 months ago  
I'm thinking this is 2,  
 upvoted 1 times
- ✉ **Univega** 1 year, 10 months ago  
The question was on the exam 12.10.2021.  
 upvoted 3 times

- ✉ **Meetya** 1 year, 10 months ago  
On exam  
Upvoted 3 times
- ✉ **skhan53** 2 years, 1 month ago  
<https://docs.microsoft.com/en-us/dynamics365/ai/sales/overview>  
it should AI  
and relation ship assistant  
Upvoted 1 times
- ✉ **jth** 1 year, 11 months ago  
There's no mention of "Social Selling Assistant", which is a specific piece of functionality, in that link. Social Selling Assistant is part of Social Engagement. On the exam I would answer Social Engagement, Search Topics, even though Social Engagement is deprecated since MSFT can't seem to bother themselves with removing all references to deprecated products from their exams.  
Upvoted 4 times
- ✉ **lakshmig** 2 years, 1 month ago  
1. social engagement  
2. SEARCH TOPICS  
Upvoted 4 times
- ✉ **Cyriharsh** 2 years, 2 months ago  
Incorrect.  
First one should be AI for Sales, and 2nd should be Relationship Assistant - as it is on the form.  
Upvoted 3 times
- ✉ **Wisenut** 2 years, 2 months ago  
Correct answer  
Upvoted 2 times
- ✉ **LillyAnn** 2 years, 2 months ago  
on exam  
Upvoted 1 times
- ✉ **ad3791** 2 years, 2 months ago  
on exam  
Upvoted 1 times
- ✉ **emmaleemans** 2 years, 3 months ago  
MS Social Engagement is deprecated/discontinued as of January 2020, so question isn't relevant anymore (I think).  
Upvoted 2 times
- ✉ **atyachter** 2 years ago  
Link to deprecation: <https://docs.microsoft.com/en-us/power-platform/admin/install-social-selling-assistant>  
Upvoted 2 times
- ✉ **AleMar153** 2 years ago  
Still people are reporting it on exam :(  
Upvoted 1 times
- ✉ **SKpl200** 2 years, 3 months ago  
Should be 2,1..?  
Upvoted 3 times

Answer: 争议

## Answer Area

### Requirement

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

Relationship Assistant	▼
Search topics	

Bing:

To implement the Social Selling Assistant, you should configure **Dynamics 365 AI for Sales** <sup>1</sup>. The Social Selling Assistant is a digital assistant that helps you to leverage social networks to sell more. It takes less than 5 minutes a day to grow your network, connect with the right people, and become a thought leader in your domain. The assistant proposes 10 recommended actions per day. It's easy and efficient <sup>2</sup>. However, Microsoft Social Engagement has been discontinued for all Dynamics 365 customers and is no longer included as part of any Microsoft Dynamics 365 license entitlement for new customers <sup>3</sup>. So, you do not need to configure Social Engagement. Is there anything else I can help you with? 😊

To implement the Social Selling Assistant and ensure that it can be used on a dashboard, you should configure the **Assistant** (formerly known as **Relationship Assistant**) which is part of **Dynamics 365 Sales Insights** <sup>1</sup>. The assistant keeps an eye on your daily actions and communications, and helps you stay on top of your day with insight cards that are displayed prominently throughout the application to provide tailored and actionable insights <sup>1</sup>. You can access the assistant in a variety of ways in the Sales Insights app, including through dashboards <sup>1</sup>. The administrator must enable the assistant before you can try it out <sup>1</sup>. For complete details about prerequisites, how to enable the feature, and how to set it up, see [Configure the Assistant](#) <sup>1</sup>.

Search topics are related to the **Social Engagement tool**, which is a social interaction tool for sales, marketing, and customer service professionals who want to proactively engage with their audience and customers on social media <sup>2</sup>. However, this tool is not related to the Social Selling Assistant. Is there anything else I can help you with? 😊

## Question 11

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

Answer: ACD

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

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

  **Caro**  3 years, 10 months ago

Out of the box, the following system entities are enabled for interactive dashboards:

Case  
Contact  
Account  
Social Profile  
Queue Item  
Knowledge Article  
Activities:  
Email  
Phone Call  
Task  
Appointment  
Social Activity

   upvoted 40 times

  **HassanSarhan** 2 years, 1 month ago

thank you

   upvoted 5 times

✉ [Removed] Highly Voted 3 years, 3 months ago

Answer is correct as given: Queue item, case, knowledge article

The key words here are Default and Interactive Dashboard.

There are multiple types of interactive dashboards:

1. Multi-stream interactive dashboards (Tier 1 Dashboard)
2. Single-stream interactive dashboards (Tier 2 Dashboard)
3. Entity-specific interactive dashboards (single entity Dashboard)

If you read the below in the link

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

"You can create interactive dashboards for entities that are enabled for the interactive experience. You can also enable custom entities and custom activities for the interactive dashboards.

Out of the box, the following system entities are enabled for interactive dashboards:

Case

Contact

Account

Social Profile

Queue Item

Knowledge Article

Activities:

Email

Phone Call

Task

Appointment

Social Activity"

👍 ↵ 🏴 upvoted 11 times

✉ [McRue] 2 years, 3 months ago

This actually makes sense.

👍 ↵ 🏴 upvoted 1 times

✉ [Vin22CRM] Most Recent 1 month, 3 weeks ago

Correct Ans

👍 ↵ 🏴 upvoted 1 times

✉ [digitalyash86] 1 month, 4 weeks ago

Please note that All entities supported in Unified Interface are enabled for the interactive experience dashboards.

👍 ↵ 🏴 upvoted 1 times

✉ [AyadhS] 4 months, 2 weeks ago

I might be wrong but in my opinion the Ans is right for Customer Service, not for Sales

👍 ↵ 🏴 upvoted 1 times

✉ [Stanna] 1 year, 5 months ago

<https://docs.microsoft.com/en-us/powerapps/maker/model-driven-apps/configure-interactive-experience-dashboards>

👍 ↵ 🏴 upvoted 2 times

✉ [Ross22] 1 year, 6 months ago

Selected Answer: ACD

Correct Answer

👍 ↵ 🏴 upvoted 2 times

✉ [ryan\_hoang4949] 2 years ago

Guys, we know that interactive dashboard feature is now enabled for every entity but the question notes that YOU MANAGE A SALES ENVIRONMENT by default, the answer should include entities that are available in D365 Sales: OPPORTUNITY, INVOICE, CASE.

👍 ↵ 🏴 upvoted 3 times

✉ [Guapo] 2 years, 3 months ago

In Exam.

👍 ↵ 🏴 upvoted 2 times

✉ [Gurushanthamurthy] 2 years, 4 months ago

Out of the box, the following system entities are enabled for interactive dashboards:

Case

Contact

Account

Social Profile

Queue Item

Knowledge Article

Activities:

Email

Phone Call

Task

Appointment

Social Activity

👍 ↵ 🏴 upvoted 1 times

- ✉ **Dean0918** 2 years, 5 months ago  
If is sales, the answer should be lead, opportunity, case, because other entities are not in sales I think.  
 upvoted 3 times
- ✉ **jkaur** 2 years, 6 months ago  
Answer is ACD  
 upvoted 2 times
- ✉ **NaiveDynamicsUser** 2 years, 8 months ago  
In Exam  
 upvoted 1 times
- ✉ **Rachha** 3 years, 2 months ago  
knowledge article  
case  
queue item  
 upvoted 1 times
- ✉ **jit55** 3 years ago  
This question is no more valid now... as Enable Interactive Experience property is deprecated and every entity in unified/power apps is enabled for Interactive Service Dashboards/hub.  
 upvoted 4 times
- ✉ **KevH** 2 years, 9 months ago  
Correct. I have just created an interactive dashboard for the Lead entity. As per question 12 Topic 1  
 upvoted 1 times
- ✉ **Bains** 3 years, 4 months ago  
Now in D365 Online V9.1.0000.15334 - There's no default option for Enable for Interactive Experience under Entity Definition. So from the available options answers are Case, Opportunity and Invoice. This is confirmed as I installed the default Sales Hub App and manually checked the available options for Entity under Dashboards.  
 upvoted 3 times
- ✉ **Gill** 3 years, 5 months ago  
The question dis say "default Dynamics 365 for Sales environment. You are configuring a sales dashboard". So the best answer is Case Opportunity and invoice.  
 upvoted 4 times
- ✉ **Subodh** 3 years, 6 months ago  
in exam...  
 upvoted 2 times

Bing: ACD

In a default Dynamics 365 Sales environment, you can create an interactive dashboard using the following three entities: **Queue Item** (A), **Knowledge Article** (C), and **Case** (D) . These entities are enabled for interactive dashboards out of the box . However, **Opportunity** (B) and **Invoice** (E) are not mentioned as being enabled for interactive dashboards by default . Is there anything else I can help you with? 😊

## Question 12

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	<ul style="list-style-type: none"><li>Assign the user the Office 365 Global Admin role</li><li>Assign the Dynamics 365 System Customizer Security role</li></ul>
Deployment action	<ul style="list-style-type: none"><li>Select the organization for installation</li><li>Publish all customizations</li></ul>

Answer:

### Answer Area

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

✉️ WASSIM2020 Highly Voted 2 years, 9 months ago

Correct answer!

11 upvoted

KevH 2 years, 9 months ago

Agreed. Just checked. Settings > Security > Security Roles > System Customizer > Customisations Tab > Miscellaneous Privileges Section

7 upvoted

WASSIM2020 2 years, 8 months ago

I checked it and it's correct, thank's KevH

1 upvoted

Dean0918 2 years, 5 months ago

Checked, Thx

1 upvoted

Univega Most Recent 1 year, 10 months ago

The question was on the exam 12.10.2021.

3 upvoted

✉  **jkaur** 2 years, 6 months ago

Correct

   upvoted 1 times

✉  **jit55** 3 years ago

Tested.. System Customizer can install apps from appsource and second is Choosing an Organization

   upvoted 2 times

✉  **Rachha** 3 years, 2 months ago

dy 365 system customiser  
choosing the organization

   upvoted 1 times

✉  **Salas** 3 years, 2 months ago

System Customizer can also install solutions from APP Source . Tested

   upvoted 3 times

✉  **burntsecondary** 3 years, 3 months ago

A Dynamics 365 System Administrator can . . . but I don't think the Dynamics 365 System Customizer Role can. Tricky question because I don't usually use the System Customizer Role.

   upvoted 1 times

✉  **Houses** 3 years, 4 months ago

If you want to install something from appsource you must be at least service since on office 365.

   upvoted 3 times

✉  **Houses** 3 years, 4 months ago

Service admin, sorry for the misstype

   upvoted 2 times

✉  **Bains** 3 years, 4 months ago

Second answer should be Choosing the Organization as if you're not in correct org then no point of publishing the solution.

   upvoted 4 times

✉  **zljqSteven** 3 years, 3 months ago

You don't need to publish if you install a managed solution.

   upvoted 2 times

✉  **RiaanyG** 3 years, 6 months ago

can anyone verify the second option answer?

   upvoted 1 times

✉  **Stasy** 3 years, 6 months ago

It looks correct. But 'Publish all customizations' is also a part of deployment, as well as choosing of organization/

   upvoted 1 times

✉  **zljqSteven** 3 years, 3 months ago

I supposed the solution from appSource should be managed solution. So you don't need publish

   upvoted 3 times

Bing:

To implement business process flows from AppSource in a Dynamics 365 environment, you should assign the **Dynamics 365 System Customizer Security role** to the user <sup>1</sup>. This security role has access to new business process flows by default <sup>2</sup>. The System Administrator security role also has access to new business process flows by default <sup>2</sup>. However, assigning the user the **Office 365 Global Admin role** is not necessary for installing business process flows from AppSource. Is there anything else I can help you with? 😊

To install business process flows from AppSource, you should **select the organization for installation** <sup>1</sup>. This will allow you to choose the specific Dynamics 365 environment where you want to install the business process flows. Publishing all customizations is not necessary for installing business process flows from AppSource. Is there anything else you would like to know? 😊

## Question 13

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	Answer Area
Open the customized solution.	
Select <b>Web Resources</b> .	
Create a dialog.	
Create a process flow.	
Select <b>Customizations</b> .	
Select <b>Processes</b> .	

Answer:

Actions	Answer Area
	Select <b>Customizations</b> .
Select <b>Web Resources</b> .	Open the customized solution.
Create a dialog.	Select <b>Processes</b> .
	Create a process flow.

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

✉  **Kyol**  1 year, 7 months ago

Poor question. Asks to configure existing BPF, however the answer is to make something that already exists? Pretty dumb.

   upvoted 10 times

- ✉  **Kratinhos** Most Recent 1 year, 3 months ago  
On exam 27/4/22. Passed. I selected the same answers  
   upvoted 4 times
- ✉  **tobban** 1 year, 6 months ago  
On exam 19.01.2022  
   upvoted 3 times
- ✉  **hxwinchester** 1 year, 11 months ago  
Anyone has links to support this answer? Is this correct?  
   upvoted 2 times
- ✉  **Mashkar** 1 year, 10 months ago  
here it is:  
<https://docs.microsoft.com/en-us/dynamics365/customerengagement/on-premises/customize/create-business-process-flow?view=op-9-1#create-a-business-process-flow>  
   upvoted 3 times
- ✉  **lilclash** Highly Voted  4 years ago  
Select Customizations, select customize the system, select Processes and create process  
   upvoted 41 times
- ✉  **GeorgeT** Highly Voted  3 years, 8 months ago  
Correct Answer:  
1- Customization  
2- Customize the system  
3- Processes  
4- Process Flow  
   upvoted 26 times
- ✉  **OLTAC** Most Recent  3 years ago  
Customizations- Customize the system-Processes- Process Flow  
   upvoted 2 times
- ✉  **Rachha** 3 years, 2 months ago  
Customizations, select customize the system, select Processes and create process  
   upvoted 5 times
- ✉  **MarkD** 3 years, 2 months ago  
Lilclash is right. GeorgeT is wrong. Verified with a test.  
   upvoted 2 times
- ✉  **Pablohernandez** 3 years, 9 months ago  
Exactly.  
   upvoted 1 times
- ✉  **LucaV6** 3 years, 10 months ago  
Sure, exactly!  
   upvoted 1 times
- ✉  **Emdy** 3 years, 10 months ago  
Exactly  
   upvoted 1 times

## Question 14

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

Answer: A

<https://us.hitachi-solutions.com/blog/dynamics-crm-multiple-currencies/>

✉️ ned **Highly Voted** 3 years, 6 months ago

A is the correct answer.

A change to a quantity in a record doesn't force the record's money fields to be recalculated based on the latest exchange rate. When the exchange rate is updated for a transaction currency, the existing records that the currency is assigned to aren't updated. But if a money field in one of these records is later updated, or if the state of the record changes, the system retrieves the latest exchange rate for the currency and recalculates the record's money fields based on the latest rate. When you view a record, the monetary values that are shown are based on the exchange rate that was last assigned to the record. This rate might not reflect the latest exchange rate.

For example, when an order is created, the values of its money fields are calculated based on the exchange rate that's in effect for the assigned currency at that time. If the order is viewed ten days later, the values of the money fields still reflect the exchange rate that was applied when the order was created, even though the exchange rate that's assigned to the currency might have been updated several times since the order was created.

Like Share Flag upvoted 31 times

✉️ MAKHUNXA **Highly Voted** 3 years, 6 months ago

A - answer is correct  
- it changes when record's status change i.e. when opportunity closes  
- when field's value changes

Like Share Flag upvoted 16 times

✉️ Vin22CRM **Most Recent** 1 month, 3 weeks ago

**Selected Answer: A**

A is correct  
Like Share Flag upvoted 1 times

✉️ Ram0883 11 months, 1 week ago

**Selected Answer: A**

A is the correct option  
Like Share Flag upvoted 2 times

✉️ moodi86 1 year, 7 months ago

can someone who voted for A explain how would you change currency field? I think answer is A, we need to manually recalculate  
Like Share Flag upvoted 1 times

- ✉ jit55 3 years ago  
Answer is A  
Upvoted 2 times
- ✉ Dean0918 2 years, 5 months ago  
Agree with A  
Upvoted 1 times
- ✉ OLTAC 3 years ago  
The correct answer is A. The cases when the exchange rate updates are only when the record is newly created (logically), or in an existing record what triggers the update is any change in any currency field or any change in the status of this record  
Upvoted 2 times
- ✉ Rachha 3 years, 2 months ago  
A. when a change is made to a currency field  
Upvoted 3 times
- ✉ Mukesh87Prasad 3 years, 2 months ago  
A. when a change is made to a currency field - IT'S CORRECT  
Upvoted 1 times
- ✉ Preety 3 years, 6 months ago  
In exam  
Upvoted 1 times
- ✉ Theodhora 3 years, 7 months ago  
<https://us.hitachi-solutions.com/blog/dynamics-crm-multiple-currencies/>  
Upvoted 1 times
- ✉ maximn1384 3 years, 8 months ago  
A is correct - base currency is recalculated when you make a change to one of the currency fields  
Upvoted 12 times
- ✉ omarrana 3 years, 8 months ago  
Base currency value calculated only when data is updated for a reason. As you know exchange rate changes everyday and if base currency is calculated everyday then there is no way to keep actual value. In order to keep historic data crm only recalculates base currency only when you update any currency field value of the record.  
Here is the solution that updates the exchange rate everyday daily basics and it will eliminate need to recalculate base currency.  
[community.dynamics.com/.../microsoft-crm-2013-currency-exchange-rates-actualization.aspx](http://community.dynamics.com/.../microsoft-crm-2013-currency-exchange-rates-actualization.aspx)  
Upvoted 4 times
- ✉ omarrana 3 years, 8 months ago  
Is it D?  
Upvoted 1 times
- ✉ Benjamin 3 years, 9 months ago  
The question only dictates that the Currency Rates are automatically updated, but specified no further modification. Meaning that the functionality must be out of the box. Recalculate Opportunity is the standard option. Answer A would require a Business workflow putting in place.  
Upvoted 1 times
- ✉ LucaV6 3 years, 10 months ago  
the correct answer looks like the C  
Upvoted 3 times

Bing: A

In Dynamics 365, the currency exchange rate is applied to opportunity records when a change is made to a currency field. This means that the new currency exchange rate is applied to the opportunity records when a change is made to a currency field, so the correct answer is A. when a change is made to a currency field <sup>1</sup>. Is there anything else you would like to know? 😊

## Question 15

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	

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

<https://query.prod.cms.rt.microsoft.com/cms/api/am/binary/RE4COp3>

<https://predict-help.versium.com/wp-content/uploads/Versium-Predict-Setup-Guide-Microsoft-Dynamics-365.pdf>

✉  **jkaur**  2 years, 6 months ago

<https://query.prod.cms.rt.microsoft.com/cms/api/am/binary/RE4COp3>  
correct

   upvoted 12 times

✉  **HassanSarhan**  1 year, 9 months ago

1- install Versium Predict from AppSource  
2- Authenticate Versium Predict  
3- Custom Views in Dynamics 365 using Web Resources

   upvoted 3 times

✉  **AleMar153** 1 year, 12 months ago

Does it exist still?

   upvoted 1 times

✉  **pavel\_leskovets** 2 years, 8 months ago

<https://query.prod.cms.rt.microsoft.com/cms/api/am/binary/RE4COp3>

   upvoted 3 times

✉  **HassanSarhan** 2 years, 1 month ago

good explanation thank you

   upvoted 1 times

✉  **kerrigore** 2 years, 9 months ago

Correct Answer.

Reference:

<https://predict-help.versium.com/wp-content/uploads/Versium-Predict-Setup-Guide-Microsoft-Dynamics-365.pdf>

   upvoted 3 times

## Question 16

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

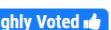
Which feature should you use?

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

Answer: B

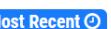
<https://docs.microsoft.com/en-us/dynamics365/customer-service/set-when-business-closed-cs-app>

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

✉  **MuhammadUllah**  3 years, 5 months ago

This answer is correct

   upvoted 10 times

✉  **Vin22CRM**  1 month, 3 weeks ago

**Selected Answer: B**

Correct Ans

   upvoted 1 times

✉  **Manisha\_RR** 1 year, 4 months ago

**Selected Answer: B**

Correct answer

   upvoted 3 times

✉  **Ross22** 1 year, 6 months ago

**Selected Answer: B**

Correct Answer

   upvoted 1 times

✉  **lakshmig** 2 years, 1 month ago

in the exam

   upvoted 2 times

✉  **NaiveDynamicsUser** 2 years, 8 months ago

In Exam

   upvoted 1 times

- ✉️ **Rachha** 3 years, 2 months ago  
business closure  
👍👎💡 upvoted 2 times
- ✉️ **Sh4z** 3 years, 5 months ago  
Answer is correct  
👍👎💡 upvoted 3 times
- ✉️ **Theodhora** 3 years, 7 months ago  
I could not find Scheduling of Business Closures from the Customer Service Hub (even with System Admin role)  
But it is possible to configure them from the Customer Service app as well:  
<https://docs.microsoft.com/en-us/dynamics365/customer-service/set-when-business-closed-cs-app>  
👍👎💡 upvoted 1 times
- ✉️ **Zeus6** 2 years, 9 months ago  
It is there -> Open the Cust Service Hub -> in bottom left hand corner change 'Service' to 'Scheduling' -> Business Closures appears in the left hand side panel (under the Settings section)  
👍👎💡 upvoted 4 times
- ✉️ **Yogeshwar** 3 years, 8 months ago  
<https://docs.microsoft.com/en-us/dynamics365/customer-service/set-when-business-closed-csh>  
👍👎💡 upvoted 2 times

Bing: B

The correct feature to use in this scenario is B. Business closure. Business Closure functionality helps organizations define non-working days and holidays to prevent scheduling resources <sup>1</sup>. You can set both the days and times that your organization will be closed <sup>2</sup>. To schedule a new business closure, you need to have the required security role or equivalent permissions <sup>2</sup>. You can schedule a business closure in the Customer Service admin center or Customer Service Hub app <sup>2</sup>. Solutions A, C, and D are incorrect because they do not directly address the requirement of preventing scheduling of sales support resources for a specific day. Events, Fiscal calendar, and Time off request may be useful for other purposes, but they are not sufficient to meet the requirement specified in the question.

## Question 17

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	Answer Area
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.	

ET User:

-create view on BPF

-add Owner from Oppty

-create chart on BPF

✉ **Geeongemail** Highly Voted 2 years, 1 month ago

It should be

- create view on BPF
- add Owner from Oppty
- create chart on BPF

@lulia, you can't create a view on BPF and then use it on Oppty chart

1 like, 1 reply, 1 upvoted 32 times

✉ **ryan\_hoang4949** Most Recent 3 months ago

The answer should be:

- Create a view of the opportunity entity and include the owner field
- Add the duration and active stage started on the view of the opportunity
- Create a chart on the opportunity entity and use the new view to include the necessary fields.

1 like, 1 reply, 1 upvoted 2 times

✉ **digitalyash86** 1 month, 4 weeks ago

There will be a 1:N relationship between Opportunity and BPF Entity, so you can not really add duration and active stage started on the opportunity view. The chart and the view both has to be on the BPF entity only. (Opportunity field i.e. Owner needs to be added to the BPF entity view - as BPF entity will always be an Org type entity.

1 like, 1 reply, 1 upvoted 1 times

✉ **pumpkin2** 1 year, 5 months ago

On exam March 2022

1 like, 1 reply, 1 upvoted 2 times

✉ **Meetya** 1 year, 10 months ago

On exam

1 like, 1 reply, 1 upvoted 2 times

✉ **Cyriharsh** 2 years ago

Agree with the comment below.

All should be created for BPF entity and the owner field should be added as a 2nd step.

1 like, 1 reply, 1 upvoted 2 times

 **IuliaMihaela** 2 years, 1 month ago

Last two options should be switched as you cannot use the Owner field in the chart if you don't add it first to the view.

   upvoted 2 times

ET Answer:

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

## Question 18

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.

ET User: CED

<https://docs.microsoft.com/en-us/power-bi/connect-data/service-real-time-streaming#:~:text=Power%20BI%20with%20real%2Dtime,real%2Dtime%20data%20and%20visuals>

<https://docs.microsoft.com/en-us/learn/modules/analyze-dynamics-365-sales-data/4-power-bi>

👤 **GeorgeT**  3 years, 8 months ago

Correct Answer:

- 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.

No need to bring data in virtual entity, Power BI will access directly the external data

   upvoted 65 times

- ✉ **reddify61** 2 years, 10 months ago  
Sorry, but how the choice E can be right?  
From here <https://docs.microsoft.com/en-us/learn/modules/analyze-dynamics-365-sales-data/4-power-bi> "Power BI tiles and dashboards can be added only to personal dashboards", so, how can we "combine Microsoft Power BI and standard charts on a standard dashboard"?  
 upvoted 2 times
- ✉ **dudenKo** 2 years, 3 months ago  
agree with this, solution should be only ONE dashboard, you can't combine PBI dashboard to Dynamics 365 with charts together on ONE dashboard  
 upvoted 3 times
- ✉ **Bialix** 2 years, 1 month ago  
What's the problem on creating personal dashboard and SHARE it among all users?  
 upvoted 1 times
- ✉ **zljjSteven** 3 years, 3 months ago  
A, B, E are three solutions. CDE are three steps of one solution.  
 upvoted 20 times
- ✉ **abhishekpan** 3 years, 2 months ago  
So CDE should be the correct answer ?? as the question says Each correct answer presents part of the solution.  
 upvoted 3 times
- ✉ **isbou** 3 years ago  
yes we have one solution composed of three steps (not a three possible solutions)  
 upvoted 2 times
- ✉ **EslamKhattab** 1 year, 3 months ago  
It is tricky, I think the correct answer is ABE  
We need PB for the mentioned visuals at point number one  
And we have to load the data into virtual entity and create the needed charts on dynamis dashboard  
 upvoted 1 times
- ✉ **prpr3** 1 year, 6 months ago  
On the exam 27.01.2022. Selected answer - CDE, but the order of these options was changed.  
 upvoted 3 times
- ✉ **ShlomiABnet** 1 year, 8 months ago  
**Selected Answer: CDE**  
CDE answer  
 upvoted 3 times
- ✉ **lakshmig** 2 years, 1 month ago  
in the exam  
 upvoted 2 times
- ✉ **Lemppy** 2 years, 4 months ago  
If you are using Power BI, there is no need for virtual entities. If you are not using Power BI, there are only two steps left and the answer needs to consist of three steps.  
 upvoted 2 times
- ✉ **skusulja** 2 years, 4 months ago  
ABE is the correct answer. I've seen it elsewhere, on a different test.  
 upvoted 2 times
- ✉ **Dean0918** 2 years, 5 months ago  
Agree with ABE  
 upvoted 1 times
- ✉ **jkaur** 2 years, 6 months ago  
Answer is CDE  
 upvoted 1 times
- ✉ **NaiveDynamicsUser** 2 years, 8 months ago  
In Exam  
 upvoted 1 times
- ✉ **RaviAjugiya** 2 years, 11 months ago  
Has anyone really noticed that Power BI is not solution for this question as Power BI doesn't give you "real time data". Refresh can be scheduled every half hour or an hour for 8 times in a day. So answer is ADE.  
 upvoted 7 times
- ✉ **PallaviDumps** 2 years, 10 months ago  
<https://docs.microsoft.com/en-us/power-bi/connect-data/service-real-time-streaming#:~:text=Power%20BI%20with%20real%2Dtime,real%2Dtime%20data%20and%20visuals>.  
 upvoted 3 times
- ✉ **RandomUser** 2 years, 7 months ago  
You'd have to do quite some work to make this interop with D365.  
 upvoted 1 times
- ✉ **RandomUser** 2 years, 7 months ago  
And then don't forget that PBI dashboards are always personal dashboards only in D365.  
 upvoted 1 times

✉ jit55 3 years ago

Answer : CDE

Like Reply Upvote upvoted 4 times

✉ gui\_scampos 3 years, 1 month ago

"Power BI will access directly the external data", only alternative A mentioned external data. If we are going to use Power BI we need to create a connection to the external data.

I think the correct answer are: A, B, E

Like Reply Upvote upvoted 1 times

✉ RobbeR 3 years, 1 month ago

Agreed.

Like Reply Upvote upvoted 1 times

✉ Rachha 3 years, 1 month ago

cde correct ans

Like Reply Upvote upvoted 4 times

✉ Preety 3 years, 6 months ago

in Exam

Like Reply Upvote upvoted 3 times

✉ TobyN 3 years, 9 months ago

Why not D? Why do you have to bring them as virtual entities, not necessary, isn't it?

Like Reply Upvote upvoted 2 times

## Question 19

HOTSPOT -

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

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

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

NOTE: Each correct selection is worth one point.

Hot Area:

### Answer Area

#### Question

Why is the satisfaction area blank?

#### Answer choice

▼
There are no closed cases
Users are not completing the satisfaction field
The Reporting Service is down
Cases with the problem solved have not been closed

Which type of account is Fourth Coffee?

▼
Active
Parent Account
Inactive
Child Account

ET User:

Users are not completing the satisfaction field

## Parent Account

✉ SKpl200 Highly Voted 2 years, 2 months ago

Correct answer:

User not capturing satisfaction

Parent Account (as the parent account field is empty). Active and Inactive is the State of the account, not type of account.

Like Reply Flag upvoted 26 times

✉ HassanSarhan 1 year, 11 months ago

Correct, thank you

Like Reply Flag upvoted 1 times

✉ digitalyash86 Most Recent 1 month, 4 weeks ago

The users are not completing the Satisfaction field. --> this is correct answer, I tried out in system.

(\*\* in case of chart, it would have shown "No Data", but in report it shows blank.)

Like Reply Flag upvoted 1 times

✉ isuruudara 5 months, 4 weeks ago

-Cases with the status resolved has not been Closed

-Parent

Like Reply Flag upvoted 2 times

✉ Jhero244 7 months, 2 weeks ago

Just that this doesn't have a parent account, means that this is a parent account. A parent can also have parents. Or an account can have neither. But the state is not a type. Weird question.

Like Reply Flag upvoted 2 times

✉ hannymaria 1 year, 1 month ago

If there is no mention of a child account, how can we classify it as a parent account? Shouldn't it qualify as an active account? Taking my exam tomorrow :)

Like Reply Flag upvoted 1 times

✉ grp12 1 year, 2 months ago

Correct Answer. On the exam 22-05-2022

Like Reply Flag upvoted 1 times

✉ prpr3 1 year, 6 months ago

On the exam 27.01.2022

Like Reply Flag upvoted 2 times

✉ LillyAnn 2 years, 2 months ago

On exam

Like Reply Flag upvoted 1 times

✉ thisiskrit 2 years, 7 months ago

Why can't this also be a Parent Account, since the field shows blank. I understand completely it is Active, just thinking out loud. Would a Child Account be shown?

Like Reply Flag upvoted 3 times

✉ avow 2 years, 7 months ago

Agreed. This is a parent account and the Status on this parent account is Active. So the better of the two answers here is Parent Account.

Like Reply Flag upvoted 2 times

✉ Deimt 2 years, 8 months ago

Is the first answer correct? Why not "There are no closed cases"?

Like Reply Flag upvoted 2 times

✉ Deimt 2 years, 8 months ago

B can't be the answer because the chart would at least show the closed cases with satisfaction "null" or undefined/empty.

Like Reply Flag upvoted 3 times

✉ digitalyash86 1 month, 4 weeks ago

The users are not completing the Satisfaction field. --> this is correct answer, I tried out in system.

(\*\* in case of chart, it would have shown "No Data", but in report it shows blank.)

Like Reply Flag upvoted 1 times

✉ vperson 2 years, 7 months ago

Not necessarily... if the view used to create the chart is filtered by values in the satisfaction field, then records with no value will not appear.

Like Reply Flag upvoted 1 times

✉ dynamicsdaddy 2 years, 8 months ago

Problem solved we would assume would be a status for cases that have been closed or solved.

Like Reply Flag upvoted 3 times

✉ raj9947 2 years, 8 months ago

In the chart there are problem solved cases.

Like Reply Flag upvoted 3 times

✉ MeThisls 2 years, 3 months ago

the donut chart shows a solved case (otherwise put, a closed case)

Like Reply Flag upvoted 2 times

CRMGurun **Highly Voted** 3 years, 3 months ago

Shouldnt option 2 be "Parent Account"? Active/Inactive status is not an account type  
upvoted 8 times

shrutzin 3 years, 3 months ago

There is no information to support that it has any child accounts. But we can see clearly it is an active account (status = active).  
upvoted 2 times

evct 3 years, 3 months ago

well actually, the fact that there is no parent account in the field parent account, kinda indicates that this account could be a parent account. Like CRMGurun said, active it's not a type but a status.  
upvoted 5 times

Gina 3 years, 2 months ago

This is true, but there is nothing in the relationships field either, which would indicate that this is a stand-alone account. I agree that it is an Active account.  
upvoted 3 times

[Removed] **Highly Voted** 3 years, 6 months ago

Correct answers are:  
1. users are not completing the satisfaction field  
2. Active

But the satisfaction field is not directly exposed on the Case form.. may be it was in the year 2005, when account over view report was created, and nobody bothered to update the report afterwards.

So in any default installation, I expect the "satisfaction" field to be always blank since it's not directly exposed in the forms or when one resolves a case.  
upvoted 6 times

jit55 **Most Recent** 3 years ago

Correct answers are:  
1. users are not completing the satisfaction field  
2. Parent  
upvoted 2 times

Vikash 3 years, 6 months ago

Correct  
upvoted 5 times

Subodh 3 years, 7 months ago

Options are not completely visible. It would be appreciated if we could see entire options.

upvoted 5 times

## Question 20

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

Answer: CD

[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))

<https://docs.microsoft.com/en-us/power-platform/admin/install-social-selling-assistant>

<https://docs.microsoft.com/en-us/dynamics365/social-engagement/social-selling-assistant-overview>

<https://docs.microsoft.com/en-us/dynamics365/social-engagement/overview>

✉  **zxc1234** 1 year, 3 months ago

i thought this question should not be quested in the exam .because :

Based on market trends and strategic direction, we have decided to focus on providing insights about broader market patterns and customer trends by enhancing capabilities in other Microsoft products. Effective January 16, 2020, Microsoft Social Engagement was discontinued for all Dynamics 365 customers and will no longer be included as part of any Microsoft Dynamics 365 license entitlement for new customers.

<https://docs.microsoft.com/en-us/power-platform/admin/install-social-selling-assistant>

   upvoted 2 times

✉  **darkdumper** 2 years, 4 months ago

BD, because Social Engagement was discontinued, you may find this question on the actual exam.

   upvoted 2 times

✉  **EslamKhattab** 2 years, 5 months ago

cd is correct

   upvoted 1 times

✉  **jkaur** 2 years, 6 months ago

CD is answer

   upvoted 1 times

✉  **Rachha** 3 years, 2 months ago

CD - CORrect

   upvoted 2 times

✉  **SMV** 3 years, 3 months ago

<https://docs.microsoft.com/en-us/power-platform/admin/install-social-selling-assistant>

answer seems correct

   upvoted 3 times

✉  **Gill** 3 years, 5 months ago

Even the documentation has been pulled. All of these links are going to the same page saying that Social Engagement was discontinued in January 2020

   upvoted 4 times

- ✉ **Subodh** 3 years, 7 months ago  
Social Engagement has been discontinued.  
Upvote 4 times
- ✉ **Stasy** 3 years, 7 months ago  
But there is no such an option in answers!  
Upvote 4 times
- ✉ **Subodh** 3 years, 7 months ago  
NO..I mean, this question should not be asked in exam.. Social engagement is deprecated.  
Upvote 2 times
- ✉ **Stasy** 3 years, 7 months ago  
I hope  
Upvote 1 times
- ✉ **dynamicsdaddy** 2 years, 8 months ago  
They test on deprecated items all the time.  
Upvote 3 times
- ✉ **Theodhora** 3 years, 7 months ago  
Following link explains you need system admin role to configure it (supporting answer D)  
<https://docs.microsoft.com/en-us/dynamics365/social-engagement/social-selling-assistant-overview>  
Upvote 3 times
- ✉ **Benjamin** 3 years, 9 months ago  
<https://docs.microsoft.com/en-us/dynamics365/social-engagement/overview> confirms in the pricing section that it has a cost and therefore a license. Supporting answer C.  
Upvote 4 times

Bing: BD

To ensure that a user can install and configure the Social Selling Assistant in Dynamics 365 for Sales, you should perform two actions: Assign the user a license for Microsoft Dynamics 365 (online) or Microsoft Social Engagement, and grant the user the system administrator or system customizer role. A license is required to use the Social Selling Assistant, and the system administrator or system customizer role provides the necessary permissions to install and configure the application. So, the correct answers are B. Assign the user a license for Microsoft Dynamics 365 (online) or Microsoft Social Engagement, and D. Grant the user the system administrator or system customizer role. Is there anything else you would like to know?

## Question 21

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

ET User: C

According to the information I found, the **Sales Manager** security role is responsible for managing a team of sellers and is also responsible for creating and managing products, setting sales targets, and projecting sales forecasts [1](#).

Therefore, the correct answer to your question is **C. Sales Manager**. Is there anything else you would like to know?

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

**marben** Highly Voted 3 years, 6 months ago

C Sales Manager seems to be correct. Created trial instance, checked Security Roles\Sales Manager\Business Management\Assign territory to user - it is enabled. For D it is disabled.

upvoted 35 times

**Mike71** Highly Voted 3 years, 6 months ago

C is the correct answer. You can go and check the default out of the box "Sales Manager" security role by going in to Settings>Security>Security Roles>Sales Manager> Business Management Tab. Review :Assign Territory to User" under Miscellaneous Privileges. OOTB it's set to "Parent: Child Business Units"

upvoted 19 times

**Bains** 3 years, 4 months ago

Agree with you - I just checked all the available roles (as per options) in default solution and only System Customizer got Assign Territory to User with Parent Child Access level.

Admin please note that there should be an option to add screenshots which I think most of us are missing.

upvoted 5 times

**Bains** 3 years, 4 months ago

Sorry I meant Sales Manager  
 upvoted 2 times

**Fer87** Most Recent 1 month, 3 weeks ago

**Selected Answer: C**

C is the correct answer

upvoted 1 times

**Mou07** 4 months, 1 week ago

System Customizer

upvoted 1 times

**christosp619** 1 year, 5 months ago

**Selected Answer: C**

C is correct

upvoted 4 times

**Samuele** 1 year, 9 months ago

**Selected Answer: C**

C Sales Manager seems to be correct.

upvoted 4 times

✉  **Bialix** 2 years, 1 month ago

Well look at this:  
<https://docs.microsoft.com/en-us/power-platform/admin/set-up-sales-territories-organize-business-markets-geographical-area#create-a-sales-territory-sales-hub-app>

Make sure that you have the Manager, Vice President, CEO-Business Manager, System Administrator, or System Customizer security role or equivalent permissions.

Is "Manager" equate to "Sales Manager"? According to this list I'd go with D.

   upvoted 5 times

✉  **AleMar153** 1 year, 11 months ago

They talk about creation there  
   upvoted 1 times

✉  **Dean0918** 2 years, 5 months ago

D is correct  
   upvoted 1 times

✉  **GozerTheGreat** 2 years, 5 months ago

I think the question is asking who can assign, not who can create. Create would be "D", assign is "C" OOB  
   upvoted 3 times

✉  **jkaur** 2 years, 6 months ago

C is correct  
   upvoted 3 times

✉  **NaiveDynamicsUser** 2 years, 8 months ago

In Exam  
   upvoted 2 times

✉  **kerrigore** 2 years, 9 months ago

Guys, I don't think the question is "what security role can assign users to territories", which is what most of you seem to be answering (and would be C).

The question is "What security role do YOU need to be able to ensure the users (i.e. sales managers) who are supposed to be able to assign salespeople to sale territories can do so (i.e. have the proper security role to do so)?", which would be D.  
   upvoted 8 times

✉  **KevH** 2 years, 9 months ago

Good point kerrigore. Just reviewed the question using your logic, and I agree "D" would be the answer  
   upvoted 2 times

✉  **KevH** 2 years, 9 months ago

Just created a clean environment in my Dynamics Trial and loaded the Sample Data.  
I have selected the following  
Settings  
Security  
Security Roles  
System Customizer  
Sales Tab. The System Customizer has read and write privilege (Modify) if you will.  
The System Customizer security role cannot create a sales territory nor can they assign sales people (users) to a sales territory. This would have to be activated via the sales and Business Management Tabs  
These are the OOB settings are :- Sales Tab, "Territory". Read and Write  
Business Management Tab, "Assign Territory to user". None Selected (Red Circle)  
The question states "has not made changes to any of the default security roles"  
So System Customizer Cannot be correct  
Sales Manager, on the other hand, has the OOB privilege to Create a territory and assign territory to user privilege set as "Parent , Child Business Units"  
   upvoted 2 times

✉  **eneboi** 2 years, 9 months ago

D is correct  
   upvoted 1 times

✉  **LT78** 2 years, 10 months ago

"assign people to sales territory" means to fill the territory manager field on the territory record. The Sales Manager have all rights to fill the territory manager field.  
So, C is correct  
   upvoted 3 times

✉  **Rachha** 3 years, 2 months ago

sales manager  
   upvoted 3 times

✉  **Marduk** 3 years, 7 months ago

the "System Customizer" role cannot assign / assign to, and the question says assign, not create. Answer is C  
   upvoted 4 times

✉  **daniel1102** 3 years, 6 months ago

Sorry, but i think Answer C is wrong. I tested it in OnPremise Environment: 1. created 3 Users in AD, added the users to CRM and add to the users Sales Manager, System Customer and Salesperson Role. The User with Sales Manager Rule cannot see the Sales Territory Setting and get the error 'you do not have permission to access these records' after i clicked in this user on Territory Record. The System Customer can see the Territory Setting and can change the manager of a territory and can add users to the territory. So i think answer D is correct. Today is my Exam and i will chose D.  
   upvoted 3 times

✉  **ahmdbilal** 3 years, 5 months ago

Sales manager roles have organization-level privileges for creating updating and deleting on territories entity  
   upvoted 2 times

✉  **Yhassim** 2 years, 7 months ago

Assign in the context of security roles mean append/append to  
   upvoted 1 times

✉  **Yhassim** 2 years, 7 months ago

the answer is System Customizer  
   upvoted 1 times

- ✉  **Amoon2** 3 years, 7 months ago  
C - "Make sure that you have the Manager..or System Customizer role" don't give away System Customizer roles just so some sales manager can manage his territories  
   upvoted 3 times
- ✉  **Jonathan92** 3 years, 7 months ago  
The question says you haven't changed the default settings, so you need to first create territory.  
Create a sales territory (Sales Hub app): "Make sure that you have the Manager, Vice President, CEO-Business Manager, System Administrator, or System Customizer security role or equivalent permissions."  
Answer is D  
   upvoted 2 times
- ✉  **[Removed]** 3 years, 6 months ago  
Question nowhere says that you haven't changed the default settings. It says that you haven't changed the default "security roles"  
   upvoted 1 times
- ✉  **Jonathan92** 3 years, 5 months ago  
after reviewing the question I now would answer C.  
   upvoted 3 times
- ✉  **aashton** 3 years, 7 months ago  
Hmmm... The correct answer is C as stated.  
   upvoted 6 times
- ✉  **olfa** 3 years, 7 months ago  
D is correct  
   upvoted 3 times

ET Answer: D

## Question 22

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	Value
Schedule type	<input type="checkbox"/> Holiday <input type="checkbox"/> Recurrence
Option	<input type="checkbox"/> Number of days <input type="checkbox"/> Owner

Answer:

## Answer Area

Item	Value
Schedule type	<input checked="" type="checkbox"/> Holiday <input type="checkbox"/> Recurrence
Option	<input checked="" type="checkbox"/> Number of days <input type="checkbox"/> Owner

✉  **jkaur**  2 years, 6 months ago

Given Answer is Correct

   upvoted 8 times

✉  **D365Mano**  1 year, 2 months ago

Can someone provide support material or reference don't understand how the options are correct?

   upvoted 3 times

✉  **azcheema** 1 year, 5 months ago

It is correct.

   upvoted 1 times

✉  **NaiveDynamicsUser** 2 years, 8 months ago

Correct and In exam

   upvoted 4 times

## Question 23

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

ET User: A

The correct answer is A. **Opportunity Close**. When an opportunity is closed, an Opportunity Close activity is created <sup>1</sup>. This activity contains information about the revenue, why the opportunity was closed, the close date, and the competitor <sup>2</sup>. You can use this entity to create a dashboard that provides information related to the last 30 days of opportunities closed as lost. Is there anything else you would like to know? 😊

<https://docs.microsoft.com/en-us/dynamics365/customer-engagement/web-api/opportunityclose?view=dynamics-ce-odata-9>

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

✉️  **D365Ninja**  3 years, 6 months ago

It is possible that the trick here is in the wording - 'You need to create a dashboard'. If it said 'You need to create a chart that shows Competitor information etc etc' then Opportunity Close would be correct. Not saying that the question isn't misleading - it is...

   upvoted 12 times

✉️  **PallaviDumps** 2 years, 10 months ago

We cannot create Charts within Opportunity Close entity.

   upvoted 7 times

✉️  **rspinler**  3 years, 8 months ago

Should this be opportunity close?

   upvoted 7 times

✉️  **ejb** 3 years, 6 months ago

Yup - Opportunity Close is an entity - I just checked, but if you don't believe me: <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/web-api/opportunityclose?view=dynamics-ce-odata-9>

   upvoted 2 times

✉️  **[Removed]** 3 years, 6 months ago

Correct. Competitor information is only available on Opportunity close and not on Opportunity.

   upvoted 2 times

✉️  **PallaviDumps** 2 years, 10 months ago

But Opportunity Close entity is not coming on Dashboard for selection.

   upvoted 5 times

✉️  **digitalyash86**  1 month, 4 weeks ago

Correct Answer: Opportunity

Why?:

A. Need is to only create a dashboard that provides information related to the last 30 days of opportunities closed as lost. (it does not mention to include competitor or reason to close in the dashboard),

B. Charts can not be created for "Opportunity Close" AND Views can not be added for "Opportunity Close" in the dashboard- So "Opportunity Close" entity is not an option.

   upvoted 2 times

✉  **Asadipour** 2 months, 3 weeks ago

Selected Answer: A

The competitor's name is in the Opportunity Close entity. Opportunity Close is a child entity for the Opportunity. So, In the views, you can't access the competitor info. Opportunity Close should be used and add any information from the opportunity, if needed!

   upvoted 1 times

✉  **Gosaisnehal** 1 year, 3 months ago

Selected Answer: B

opportunity close not available in records type to create dashboards

   upvoted 1 times

✉  **Luna18** 1 year, 6 months ago

Selected Answer: B

Correct answer should be Opportunity, as you can't create dashboards using Opportunity Close. Also, the Opportunity Close entity's purpose is "Activity that is created automatically when an opportunity is closed, containing information such as the description of the closing and actual revenue."

   upvoted 2 times

✉  **EgycrmDev** 1 year, 7 months ago

Selected Answer: A

Answer is A

   upvoted 1 times

✉  **inscho** 6 months, 3 weeks ago

Opportunity Close is no entity! The entity is Opportunity that can have a status like "closed" assigned to.

   upvoted 1 times

✉  **Cyriharsh** 2 years ago

It's just Opportunity, because we can't use Opp Close records for this kind of stuff. And anyway the Win/Lost data is stored within Opportunity entity.

   upvoted 4 times

✉  **Dean0918** 2 years, 5 months ago

Maybe we can modify the relationship to show the relation of competitor, because there is a N:N relationship between them.

B is better option I think.

   upvoted 1 times

✉  **jkaur** 2 years, 6 months ago

answer is A

   upvoted 1 times

✉  **Ashvel** 2 years, 10 months ago

Just tested it out. when selecting the record type, opportunity close isn't an option, so answer is correct.

   upvoted 3 times

✉  **KevH** 2 years, 9 months ago

Whenever an opportunity is closed as won or lost, the status is saved in the Status Field of the Opportunity entity

This can be used to display opportunities closed as lost in a dashboard

   upvoted 2 times

✉  **LT78** 2 years, 10 months ago

the question only states that the salesman fill the information asked into the opportunity close window; but it doesn't ask to see all those specific information into a view.  
so the correct answer is: B

   upvoted 1 times

✉  **RoelG** 2 years, 11 months ago

You can create a view on Opp.Close entity by doing Advanced Find on Activities and then related entity Opportunity Close

   upvoted 1 times

✉  **NanaKe** 2 years, 11 months ago

The question is "create a dashboard" not a "view" and when creating a dashboard you have to choose the "record type" which is Opportunity entity (there is no "opportunity closed entity proposed in the list) and THEN add a view of "closed opportunity" I've just tried it. So I think the right answer is Opportunity

   upvoted 5 times

✉  **davzi** 3 years ago

You definitely can create a view and dashboard with Opportunity Close. How will you get the opportunity close end date to create a view in the last 30 days from Opportunity - this is on opp close.

   upvoted 1 times

✉  **jit55** 2 years, 11 months ago

Opportunity Close is an internal entity. You can't create dashboard on this entity.

When you close the Opportunity, opportunity close activity gets created. You can access details of opportunity close through these activities.

   upvoted 1 times

✉  **DaneP** 3 years, 1 month ago

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

I think it's opportunity close.

   upvoted 2 times

- ✉ **Mukesh87Prasad** 3 years, 1 month ago  
Ans is opportunity as we cannot create charts with opportunity close.  
Upvoted 1 times
- ✉ **Rachha** 3 years, 2 months ago  
opportunity close is the correct answer . plz check in the default solution by creating views for both opportunity and opportunity close entities. Competitor field is not available in Opportunity view so answer is Opportunity close  
Upvoted 2 times
- ✉ **jit55** 3 years ago  
Correct Answer is Opportunity. Question is to create a Dashboard and not a view. Opportunity Close entity is not available while creating dashboards.  
Upvoted 2 times
- ✉ **jit55** 3 years, 2 months ago  
Answer is Opportunity  
Upvoted 3 times
- ✉ **Gill** 3 years, 5 months ago  
Opportunity Close is an entity - and a view containing the required fields can be created - via customise the system. However, using that view is little more problematic.  
If we revert to Opportunity, we cannot get the competitor - without customisation.  
Upvoted 1 times
- ✉ **sunilm2** 3 years, 5 months ago  
I think the question trick is - Just they asked to create dashboard for opportunity lost records and didnt asked anywhere to add competitor to it. So no need to analyse more and Correct answer will be B - Opportunity.  
Upvoted 2 times
- ✉ **Nath** 3 years, 5 months ago  
I read a lot of time this question. In fact, the Dashboard doesn't need to display competitor or something else. The question is to know on which entity you have to request lost opportunities since the 30 last days. So for me it's from Opportunity entity.  
Upvoted 3 times
- ✉ **Exam007** 3 years, 5 months ago  
Cannot create chart/view on Opportunity Close entity for Dashboard. So answer B is correct.  
Upvoted 2 times
- ✉ **Mike71** 3 years, 5 months ago  
Answer is B - I just created a dashboard showing closed lost opps using opportunity entity since you won't be able to create a view or chart using opportunity close . Key here is "You need to create a dashboard that provides information related to the last 30 days of opportunities closed as lost."  
Upvoted 4 times
- ✉ **[Removed]** 3 years, 5 months ago  
And you managed to add Competitors to this view/dashboard? Then please post an image to support your answer, because tit's not possible to do so in my opinion  
Upvoted 4 times
- ✉ **BoxonToxonFlop** 2 years, 8 months ago  
It isn't possible, but nor is creating a dashboard for opportunity close  
Upvoted 1 times
- ✉ **PallaviDumps** 2 years, 10 months ago  
One can create view but not Chart from Opportunity Close.  
Upvoted 1 times
- ✉ **Preety** 3 years, 6 months ago  
In Exam  
Upvoted 3 times
- ✉ **naladacoco** 3 years, 7 months ago  
Opportunity close is not an entity. So answer B  
Upvoted 4 times
- ✉ **[Removed]** 3 years, 6 months ago  
And how did you arrive at this conclusion that it's not an entity? Open default solution and see for yourself if it's an entity or not? Whether it's visible in advanced find or not..it's another question.  
Yi. "Opportunity Close" is a child activity type, just like task or email. Only thing is that it's a non-regular activity  
Upvoted 3 times
- ✉ **andrevagil** 3 years, 3 months ago  
It is an entity, but you cannot create a Dashboard linked to the "opportunity close". Answer is "opportunity"  
Upvoted 7 times
- ✉ **Theodhora** 3 years, 7 months ago  
Entity Opportunity Closure is not available in Advanced Find, so it is not possible to make a view out of it and thus not possible to make a Dashboard out of it.  
Upvoted 3 times
- ✉ **PallaviDumps** 2 years, 10 months ago  
I just made a view for Opportunity Close entity.  
Upvoted 1 times

ET Answer: B

## Question 24

An organization uses Dynamics 365 for Sales.

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

What should you do?

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

Answer: C

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

<https://docs.microsoft.com/en-us/power-platform/admin/using-word-templates-dynamics-365>

 **Preety** Highly Voted 3 years, 6 months ago

Answer C is correct

   upvoted 13 times

 **Yogeshwar** Highly Voted 3 years, 8 months ago

<https://docs.microsoft.com/en-us/power-platform/admin/using-word-templates-dynamics-365>

   upvoted 5 times

 **Vin22CRM** Most Recent 1 month, 3 weeks ago

Selected Answer: C

Yes F'ing Correct

   upvoted 1 times

 **christosp619** 1 year, 5 months ago

Selected Answer: C

C is correct

   upvoted 2 times

 **jkaur** 2 years, 6 months ago

Answer C is correct

   upvoted 1 times

 **Veektoreous** 2 years, 8 months ago

Enable developer tab

   upvoted 1 times

 **Rachha** 3 years, 2 months ago

Developer tab

   upvoted 1 times

 **Preety** 3 years, 6 months ago

In exam

   upvoted 3 times

 **Subodh** 3 years, 6 months ago

similar question in exam..

   upvoted 2 times

## Question 25

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

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

Which security role can you use?

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

Answer: D

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

👤 Rosia 6 months ago

the correct answer is sales manager role and its not listed, the roles listed do not include the necessary privileges to manage sales territories, so they would not be suitable for this task.

👍👎FLAG upvoted 3 times

👤 Sickgb 2 months ago

Ceo does have the privilege to assign to territories its under business' management miscellaneous privileges.

👍👎FLAG upvoted 1 times

👤 tobban 1 year, 6 months ago

On exam 19.01.2022

👍👎FLAG upvoted 1 times

👤 javiercheke 1 year, 7 months ago

question 27 with other options

👍👎FLAG upvoted 2 times

👤 jkaur 2 years, 6 months ago

Correct

👍👎FLAG upvoted 2 times

👤 NaiveDynamicsUser 2 years, 8 months ago

In Exam

👍👎FLAG upvoted 2 times

👤 BenJames 2 years, 9 months ago

Correct

👍👎FLAG upvoted 2 times

## Question 26

You work for a company using Dynamics 365 for Sales.

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

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

What should you do?

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

Answer: A

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

👤 sinjan Highly Voted 1 year, 10 months ago

Correct answer is A

👍 ↗️ 🎉 upvoted 6 times

👤 JaTrump Highly Voted 1 year, 11 months ago

This is the same question as Question # 8.

👍 ↗️ 🎉 upvoted 6 times

👤 digitalyash86 Most Recent 2 months ago

Even if you ignore the fact that changing the length of suffix will be applicable to all entities: if you change Suffix length to 4, then total length would be 14 chars (QUO-01001-AS7F) and if you change prefix to 1 char, then total length would be 13 chars (Q-01001-AS7FX) {assuming the suffix length stays 5 char which is default length}

So correct answer should be "A. Reduce the auto number prefix to one character"

👍 ↗️ 🎉 upvoted 2 times

👤 Rosia 6 months, 1 week ago

In Dynamics 365 for Sales, the quote numbers are automatically generated using the Auto Number feature. To shorten the quote numbers, you can reduce the Auto Number Prefix to one or two characters, depending on the total number of quotes that are expected to be created.

Therefore, the correct answer is either A. Reduce the auto number prefix to one character or B. Reduce the auto number prefix to two characters.

👍 ↗️ 🎉 upvoted 2 times

👤 AAR75 1 year, 3 months ago

Selected Answer: A

Correct

👍 ↗️ 🎉 upvoted 1 times

👤 Caax 1 year, 5 months ago

Selected Answer: A

A is correct

👍 ↗️ 🎉 upvoted 3 times

👤 sinjan 1 year, 10 months ago

If you change the suffix, it applies to all entities. But, if you change prefix, it applies to the concerned entity only. Since, customers are complaining about quotes only, we need to reduce the prefix only.

👍 ↗️ 🎉 upvoted 1 times

 **HX** 2 years, 1 month ago

The answer is correct. The minimum character for Prefix is 1 and the max is 3

   upvoted 1 times

 **Bialix** 2 years, 1 month ago

Actually default length of prefix is 3 like QUA for quote. Default suffix is between 4 to 6, don't remember OOB value. Let's take 6 as default, why not. Reducing 6 to 4 and 3 to 1 gives same result. So A and C may be correct as well.

Hard to believe that both answers will be correct. We do not know how full number looks now. Was it changed earlier?

I'd go with reducing prefix as much as possible.

   upvoted 1 times

 **SKpi200** 2 years, 3 months ago

correct answer is A - you can change the Prefix, not the suffix

   upvoted 1 times

 **Don\_George** 2 years, 5 months ago

The correct answer is C

   upvoted 2 times

 **jkaur** 2 years, 6 months ago

B is answer

   upvoted 1 times

 **Don\_George** 2 years, 4 months ago

It's wrong, the answer B is similar to A without one letter. The correct answer is C

   upvoted 2 times

 **RodrigoCristo** 2 years, 7 months ago

The correct answer is:

C. Reduce the suffix length to four characters

   upvoted 3 times

 **gt30** 2 years, 7 months ago

Wouldn't it be A. If you reduce the suffix length to 4 characters it reduces it for all entities. The question specifically says to reduce the length for quotes?

   upvoted 5 times

 **ducavollo** 2 years, 8 months ago

correct!

   upvoted 4 times

 **lorper** 2 years, 3 months ago

There is a similar question: 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

The point is to reduce the PREFIX as much as possible. So it is correct.

   upvoted 6 times

## Question 27

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.

ET User:

Add a custom field to store the time.

The Propose stage becomes inactive, and the Develop stage becomes active.

<https://nakedcrm.wordpress.com/2017/06/06/how-can-i-work-out-the-time-spent-in-each-stage-of-a-business-process/>

✉ **WASSIM2020** Highly Voted 2 years, 9 months ago

For the first question, the answer is Add a custom field to store the time, we need a field to show in Qualify stage and not a report  
Upvoted 19 times

✉ **Natalia** 2 years, 8 months ago

If create Process Flow, as an example I used the Opportunity Sales Process, it is possible to add Stage, Conditional, Data Step, Workflow, Action Step, and Flow Step. 7 Data Steps are used for the Qualify stage  
Upvoted 3 times

✉ **sdi21** Highly Voted 2 years, 6 months ago

For question two, the Propose stage becomes inactive, and the Develop stage becomes active. Tried and tested.  
Upvoted 12 times

✉ **Dean0918** 2 years, 5 months ago

Agree, thanks!  
Upvoted 1 times

✉ **digitalyash86** Most Recent 2 months ago

If the stage specific duration is not being captured at all, how can only creating a fetchxml based report help. Either you create a report or a view, it will require a custom field to store duration for the stage and changes in Flow/workflow etc to calculate the duration.

In my solution to a customer, I would capture entry and exit time for each stage and a calculated field to capture duration for stage.

Upvoted 1 times

✉ **MP270915** 3 months, 1 week ago

Sorry, correct answers: 3 & 1  
Upvoted 2 times

✉ **MP270915** 3 months, 1 week ago

Correct answers: 4 & 1  
Upvoted 1 times

✉ **pumpkin2** 1 year, 5 months ago

On exam March 2022

Upvoted 2 times

- ✉ **PowerManasi** 1 year, 5 months ago  
 I think its correct. 1. You create a fetchxml because adding custom field later does not show you anything on past records. Also, its a half solution- how will it calculate time?  
 2. Is correct because thats how it works if used correctly.  
1 2 3 upvoted 2 times
- ✉ **Luna18** 1 year, 6 months ago  
 for the 2nd questions, both stages remain active as long as I don't click on "Set active" on the stage I'm returning to. So I wonder what does MS consider as correct..  
1 2 3 upvoted 1 times
- ✉ **Meetya** 1 year, 10 months ago  
 On exam  
1 2 3 upvoted 3 times
- ✉ **Cyriharsh** 2 years, 1 month ago  
 I can't imagine XML report that shows that time, but actually at work I've created a custom entity with fields to store BPF stage durations and it worked well.  
1 2 3 upvoted 4 times
- ✉ **lakshmis** 2 years, 1 month ago  
 after adding the field, the easiest way to get your answer is to fetch a report using the field isn't it?  
1 2 3 upvoted 1 times
- ✉ **Lemppy** 2 years, 4 months ago  
 I think the answer is:  
 Add a custom field to store the time  
 The Process stage becomes inactive and the Develop stage becomes active  
 I believe the duration of a single stage is not saved anywhere, like the duration for the entire process is. So reporting it is not possible before you store the update date or duration somewhere.  
1 2 3 upvoted 6 times
- ✉ **A\_A\_C** 2 years, 5 months ago  
 As MS advises, it always better to stick with the standard solutions.  
 I think when they elaborate the questions, they do not think about personalized/particular custom development style, as we developers do. So I think Fetch Report is the most accurate answer  
1 2 3 upvoted 1 times
- ✉ **chaxta** 2 years, 6 months ago  
 Custom Field for the first part - <https://nakedcrm.wordpress.com/2017/06/06/how-can-i-work-out-the-time-spent-in-each-stage-of-a-business-process/>  
1 2 3 upvoted 3 times
- ✉ **BigBree** 2 years, 8 months ago  
 I'm not sure about the answer to the 2nd question, because I can update a field in a previous stage without making it active.  
1 2 3 upvoted 1 times
- ✉ **Nataliia** 2 years, 8 months ago  
 If click Back on the Propose stage on the Business Process Workflow, the Propose stage becomes inactive, and the Develop stage becomes Active  
1 2 3 upvoted 2 times
- ✉ **gt30** 2 years, 7 months ago  
 I think based on the options available, it's the first option and assumes you'd follow the correct process when using BPF  
1 2 3 upvoted 1 times

ET Answer:

#### Answer Area

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

Create a SSRS report.
<b>Create a FetchXML report.</b>
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?

<b>The Propose stage becomes inactive and the Develop stage becomes active.</b>
The Propose stage remains active and the Develop stage becomes active.
The Propose stage remains active and the Develop stage becomes revised.

## Question 28

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	<ul style="list-style-type: none"><li>Use a filter</li><li>Alter the existing chart</li><li>Create a new chart</li></ul>
Value to use	<ul style="list-style-type: none"><li>Status</li><li>Status Reason</li><li>Completed</li></ul>

ET User:

Create a new chart

Status Reason

 **Cyriharsh** Highly Voted  2 years ago

I guess the answer is correct here, given the fact of tricky wording... They are not asking to update the chart or to create a new chart, they're talking about "update a dashboard" and it looks to me that I just have to filter the chart on the dashboard using that field and that's it.

   upvoted 12 times

 **[Removed]** Most Recent  2 months, 3 weeks ago

Feel it should be 1. Alter existing dashboard and 2. use Status Reason.

Asking to update the dashboard...not create new.

   upvoted 1 times

 **SKpl200** 2 years, 3 months ago

Correct answer: Create A NEW chart, where the field is Status Reason (current chart is using Status field).

   upvoted 4 times

 **NaiveDynamicsUser** 2 years, 8 months ago

In exam...

   upvoted 4 times

 **MireiaRC** 2 years, 9 months ago

I think he first answer is "Alter the existing chart..." the request is: You need to UPDATE the dashboard to display wrong phone numbers.

   upvoted 2 times

 **Deimt** 2 years, 8 months ago

I guess you use a filter to perform this UPDATE. It says you have to display (only) wrong numbers, altering the chart will not help, as you need to put a filter on the view which is used in the chart.. Or am i mistaking?

   upvoted 17 times

ET Answer:

## Answer Area

Requirement	Value or action
Modification to make	<div style="border: 1px solid black; padding: 5px; width: fit-content;"><p>▼</p><ul style="list-style-type: none"><li>Use a filter</li><li>Alter the existing chart</li><li>Create a new chart</li></ul></div>
Value to use	<div style="border: 1px solid black; padding: 5px; width: fit-content;"><p>▼</p><ul style="list-style-type: none"><li>Status</li><li>Status Reason</li><li>Completed</li></ul></div>

## Question 29

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

ET User:

Interactive Experience Dashboard

Single-Stream

Home Page

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

sk\_cert Highly Voted 2 years, 5 months ago

Interactive

Single-Stream => "The tiles are positioned on the right side of the dashboards and are always shown"  
Home Page => Creation of Single Stream Dashboard is not possible at location "Entity"

upvoted 24 times

HassanSarhan 2 years, 1 month ago

agree thanks

upvoted 3 times

BoxonToxonFiop Highly Voted 2 years, 8 months ago

Dashboards that permanently show tiles are single stream. It even says in the source. "The tiles are positioned on the right side of the dashboards and are always shown"

upvoted 11 times

WASSIM2020 2 years, 7 months ago

Correct, the tiles are available only on single stream

upvoted 4 times

- ✉ lorper 2 years, 3 months ago  
There is a good point in the statement: "lists customers and their activities". Single stream does not list both. Tricky question. I'll go with multi-stream because it also has tiles if you turn it on.  
🕒 🕒 🕒 upvoted 3 times
- ✉ digitalyash86 [Most Recent] 1 month, 4 weeks ago  
It lists customers and their activities and Must have Tiles.  
While single stream can only have one stream and might have /might not have tiles.  
So I will go with Multi Stream as answer.  
🕒 🕒 🕒 upvoted 1 times
- ✉ Jhagidara 10 months, 2 weeks ago  
Interactive dashboards come with two forms: Single-Stream and Multi-Stream. A stream is another name of a CRM view, so multi-stream dashboards come with multiple streams connected to a single entity. For example, the case entity connects to other entity streams like queue, activities, etc. In Single-Stream you can choose only one stream but you are able to add more charts and tiles.  
🕒 🕒 🕒 upvoted 2 times
- ✉ Kratinhos 1 year, 3 months ago  
On exam 27/4/22. Passed. I selected  
Interactive dashboard  
Single-stream  
Home page  
🕒 🕒 🕒 upvoted 2 times
- ✉ tobban 1 year, 7 months ago  
On exam 19.01.2022  
🕒 🕒 🕒 upvoted 1 times
- ✉ ryan\_hoang4949 2 years ago  
IE Dashboard allows you to directly interact with records. In this case, you can create a single stream IE Dashboard for Accounts, which allows you to interact with activities associated with account records.  
Single stream dashboards are not available at Entity Level. Therefore, you must create the dashboard on Home Page.  
🕒 🕒 🕒 upvoted 4 times
- ✉ lakshmig 2 years, 1 month ago  
i feel  
interactive, multi stream and entity are the answers  
"so multi-stream dashboards come with multiple streams connected to a single entity. For example, the case entity connects to other entity streams like queue, activities, etc." this statement made me feel so  
🕒 🕒 🕒 upvoted 1 times
- ✉ Dean0918 2 years, 5 months ago  
interactive  
Single  
Entity  
🕒 🕒 🕒 upvoted 2 times
- ✉ Dean0918 2 years, 5 months ago  
Sorry, should be  
interactive  
Single  
Homepage  
🕒 🕒 🕒 upvoted 7 times
- ✉ s\_zooloo 2 years, 5 months ago  
Creation Location - Entity  
From <https://docs.microsoft.com/en-us/dynamics365/customerengagement/on-premises/customize/configure-interactive-experience-dashboards>  
Configure an entity-specific dashboard  
An entity-specific dashboard is a multi-stream dashboard. Configuring this dashboard is similar to configuring a home page multi-stream dashboard, but you do it in the different place in the UI and there are other minor differences. For example, instead of selecting an entity, some fields in the entity-specific dashboard are preset to the entity for which you are creating the dashboard.  
Go to Settings > Customizations > Customize the System.  
Under Components, expand Entities and select the entity you want. Select Dashboards under the entity, in the navigation pane.  
In the grid, select New, and then select Interactive experience dashboard in the drop-down list.  
Choose the layout, either 2, 3, or 4 column width.  
🕒 🕒 🕒 upvoted 1 times
- ✉ aok95 2 years, 6 months ago  
If it is single-stream, then wouldn't the creation location also be entity because home page is only for multi stream?  
🕒 🕒 🕒 upvoted 1 times
- ✉ chaxta 2 years, 6 months ago  
Multi-stream can be homepage or entity specific - <https://docs.microsoft.com/en-us/dynamics365/customerengagement/on-premises/customize/configure-interactive-experience-dashboards>  
🕒 🕒 🕒 upvoted 1 times
- ✉ synalis 2 years, 7 months ago  
The tiles are available also by Multi stream.  
"Multi-stream dashboard tile view"  
<https://docs.microsoft.com/en-us/dynamics365/customerengagement/on-premises/customize/configure-interactive-experience-dashboards>  
🕒 🕒 🕒 upvoted 5 times

ET Answer:

## Answer Area

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

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

## Question 30

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.	<div style="border: 1px solid black; padding: 5px;"><a href="#">Configure a record creation and update rule</a> <a href="#">Configure a business process flow</a></div>
Create a lead	<div style="border: 1px solid black; padding: 5px;"><a href="#">Specify auto-response settings</a> <a href="#">Specify conditions for record creation</a></div>

Answer:

### Answer Area

Requirement	Action
Ensure an auto response is sent.	<div style="border: 1px solid black; padding: 5px; background-color: #e0f2e0;"><a href="#">Configure a record creation and update rule</a> <a href="#">Configure a business process flow</a></div>
Create a lead	<div style="border: 1px solid black; padding: 5px; background-color: #e0f2e0;"><a href="#">Specify auto-response settings</a> <a href="#">Specify conditions for record creation</a></div>

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

□  **agoodwin24**  1 year, 10 months ago

I hope everyone gets this one right lol

   upvoted 6 times

□  **jkaur**  2 years, 6 months ago

Correct

   upvoted 5 times

□  **Jacks83**  5 months ago

Create a record creation and update rule

Specify auto-response settings

   upvoted 1 times

□  **NaiveDynamicsUser** 2 years, 8 months ago

Correct and in exam

   upvoted 4 times

□  **BenJames** 2 years, 9 months ago

Correct

   upvoted 4 times

## Question 31

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

Answer: A

  OleGL  2 years, 9 months ago

A is correct answer because in advanced find u create >personal< views

   upvoted 15 times

  brunotw  1 year, 5 months ago

Such a poor solution.

   upvoted 4 times

  NaiveDynamicsUser 2 years, 8 months ago

In Exam

   upvoted 2 times

## Question 32

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

Answer:

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

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

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

SKpl200 2 years, 3 months ago

The given answers are correct

upvoted 11 times

GuptaAnand 1 month, 3 weeks ago

answer is correct -

Global filter can apply on field level

upvoted 1 times

- ✉ **Jacks83** 5 months ago  
How would you get case priority from an Account? That's a 1-N relationship?  
 upvoted 1 times
- ✉ **pumpkin2** 1 year, 5 months ago  
On exam March 2022  
 upvoted 2 times
- ✉ **AHMLBD** 2 years, 6 months ago  
I think that "Created On" is also a Timeframe filter.  
Ref: <https://docs.microsoft.com/en-us/dynamics365/customer-service/customer-service-hub-user-guide-dashboard#timeframe-filter>  
 upvoted 2 times
- ✉ **[Removed]** 2 years, 5 months ago  
I agree it's either time or visual, global is the only one its definitely not..  
 upvoted 1 times
- ✉ **[Removed]** 2 years, 5 months ago  
unless you it means show all for this created date, or this created date.. and then it's global  
 upvoted 1 times
- ✉ **missdee** 2 years, 5 months ago  
Agree. No created on option under Global Filter. Should the answer be Timeframe Filter for this hmmm  
 upvoted 1 times
- ✉ **Dotzs** 1 year, 7 months ago  
Yes I guess  
 upvoted 1 times
- ✉ **JdH** 2 years, 4 months ago  
Created On is not a filter in this question...  
View account BY created on, so it's a sort order.  
Filter is All -> Global  
Answer is correct  
 upvoted 2 times
- ✉ **jkaur** 2 years, 6 months ago  
Correct  
 upvoted 1 times
- ✉ **NaiveDynamicsUser** 2 years, 8 months ago  
Correct and in exam  
 upvoted 4 times

## Question 33

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

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

What should you do?

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

Answer: A

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

 **jkaur** Highly Voted 2 years, 6 months ago

Correct

   upvoted 7 times

 **Kratinhos** Most Recent 1 year, 3 months ago

On exam 27/4/22. Passed. I selected same answer

   upvoted 3 times

 **NaiveDynamicsUser** 2 years, 8 months ago

Correcr and in exam

   upvoted 4 times

## Question 34

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

Answer: D

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

<https://community.learnsdynamics.com/post/configure-sales-territories-in-microsoft-dynamics-365-5f118058355f047613ad553b>

✉ Moina1706 Highly Voted 2 years, 9 months ago

Answer should be "D"

Like Retweet Flag upvoted 21 times

✉ Zeus6 2 years, 9 months ago

Interested to know why you think that? what permissions are you comparing?

Like Retweet Flag upvoted 2 times

✉ WASSIM2020 Highly Voted 2 years, 9 months ago

Correct answer is D

Like Retweet Flag upvoted 11 times

✉ AP2020 Most Recent 7 months, 1 week ago

Selected Answer: D

Correct

Like Retweet Flag upvoted 2 times

✉ maba 8 months, 2 weeks ago

Selected Answer: C

Because I have to ensure that a user1 can assign salespeople to sales territories. So, I should have access to users and their security roles.

Like Retweet Flag upvoted 1 times

✉ lakshmig 2 years, 1 month ago

D is the answer as system customizer cant assign sales people to sales territories.

Like Retweet Flag upvoted 2 times

✉ JoeS007 2 years, 1 month ago

The correct answer is C - "Make sure that you have the Manager, Vice President, CEO-Business Manager, System Administrator, or System Customizer security role or equivalent permissions." Reference: <https://docs.microsoft.com/en-us/power-platform/admin/set-up-sales-territories-organize-business-markets-geographical-area>

Like Retweet Flag upvoted 1 times

✉ Ross22 2 years, 2 months ago

Important: Out of the box (default) security roles required to create Sales Territories and assign a salesperson to Sales Territories are Account Manager, Sales Manager, Vice President of Sales, CEO-Business Manager, System Administrator security role or equivalent permissions.

The System customizer security role cannot create a sales territory but can read and write (modify) it. Also, System customizer cannot assign a salesperson (user) to a sales territory.

Please test this in your Dynamics 365 Sales App.

Like Retweet Flag upvoted 5 times

✉  **meriadoc71** 2 years, 5 months ago

In this link (<https://docs.microsoft.com/en-us/power-platform/admin/set-up-sales-territories-organize-business-markets-geographical-area>) seems that Manager, Vice President, CEO-Business Manager, System Administrator, or System Customizer are able to do that.

   upvoted 2 times

✉  **meriadoc71** 2 years, 5 months ago

Read also here for confirmation (CEO is the right answer): <https://community.learnmsdynamics.com/post/configure-sales-territories-in-microsoft-dynamics-365-5f118058355f047613ad553b>

   upvoted 3 times

✉  **jkaur** 2 years, 6 months ago

D is the answer.

   upvoted 2 times

✉  **NaiveDynamicsUser** 2 years, 8 months ago

In exam

   upvoted 2 times

✉  **KevH** 2 years, 9 months ago

The question states that "The solution must use the principle of least privilege"

The link below tell us that we must Make sure that we have the Manager, Vice President, CEO-Business Manager, System Administrator, or System Customizer security role or equivalent permissions

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

Hence "C" is the correct answer

   upvoted 4 times

✉  **KevH** 2 years, 9 months ago

I Stand corrected everyone, apologies for the incorrect statement. The Answer is D.

I looked at the OOB System Customizer Security Role, and users with this security role cannot create sales territories or assign members to sales territories

   upvoted 7 times

✉  **Dean0918** 2 years, 5 months ago

Agree with D

   upvoted 1 times

✉  **WASSIM2020** 2 years, 9 months ago

System Customizer don't have a privilege to assign user to territory

   upvoted 3 times

✉  **Zeus6** 2 years, 9 months ago

Agreed

   upvoted 1 times

✉  **BenJames** 2 years, 9 months ago

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

   upvoted 1 times

✉  **BenJames** 2 years, 9 months ago

Should be D

   upvoted 2 times

## Question 35

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

Answer: D

<https://docs.microsoft.com/en-us/learn/modules/manage-relationships-social-selling-dynamics-365-sales/3-manage-relationship-health-with-sales-insights>

✉️  **MuhammadSaadFahim** Highly Voted  2 years, 4 months ago

Correct..Using Dynamics 365 Sales Insights -> Relationship Analytics

   upvoted 8 times

✉️  **prpr3** Most Recent  1 year, 6 months ago

On the exam 27.01.2022

   upvoted 2 times

✉️  **jkaur** 2 years, 6 months ago

Correct

   upvoted 2 times

✉️  **WASSIM2020** 2 years, 7 months ago

Correct :

<https://docs.microsoft.com/en-us/learn/modules/manage-relationships-social-selling-dynamics-365-sales/3-manage-relationship-health-with-sales-insights>

   upvoted 3 times

✉️  **Veektoreous** 2 years, 8 months ago

Correct

   upvoted 2 times

## Question 36

You are a Dynamics 365 administrator for a dental office.

You need to create a process in Sales Hub to ensure that team members perform the following actions:

- ☞ Call patients to remind them about upcoming appointments.
- ☞ Update patient contact information.

What should you create?

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

Answer: A

<https://community.dynamics.com/crm/b/crm365blog/posts/microsoft-dynamics-365-unified-interface-task-flow-feature>

<https://neilparkhurst.com/2016/12/24/task-flows/>

✉ **Zakaria10** 1 year, 5 months ago

task flow are deprecated no ?

   upvoted 2 times

✉ **prpr3** 1 year, 6 months ago

On the exam 27.01.2022

   upvoted 2 times

✉ **Cyriharsh** 2 years ago

Not sure that Task Flow is a process but seems correct.

   upvoted 2 times

✉ **La\_qicka** 2 years, 4 months ago

correct

<https://community.dynamics.com/crm/b/crm365blog/posts/microsoft-dynamics-365-unified-interface-task-flow-feature>

   upvoted 4 times

✉ **HassanSarhan** 2 years, 1 month ago

good link thanks

   upvoted 1 times

✉ **zukito3** 1 year, 10 months ago

thanks for the link!

   upvoted 1 times

✉ **jkaur** 2 years, 6 months ago

Correct

   upvoted 1 times

✉ **Natalia** 2 years, 8 months ago

Correct. <https://neilparkhurst.com/2016/12/24/task-flows/>

   upvoted 3 times

## Question 37

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	<span data-bbox="1259 810 1322 878">^</span> <span data-bbox="1259 900 1322 968">▼</span>

Answer:

Actions	Answer Area
Configure the channel provider	Download and import the Dynamics 365 Channel Integration Framework
Download and import the Dynamics 365 Channel Integration Framework	Navigate to the Channel Integration Framework application
Enable for mobile client	> Configure the channel provider
Set up server-side synchronization	< <span data-bbox="1259 1484 1322 1619">^</span> <span data-bbox="1259 1551 1322 1619">▼</span>
Navigate to the Channel Integration Framework application	
Enable Microsoft Teams integration	

<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>

<https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/sample-softphone-integration#:~:text=A%20softphone%20dialer%20provides%20a,activity%20in%20Dynamics%20365%20Sales>

✉  **jkaur**  2 years, 6 months ago

Correct

   upvoted 8 times

✉  **avow**  2 years, 7 months ago

This question is pretty terrible because Integration Framework is an Appsource application. You do not download applications from the AppSource, you point them to your organization.

   upvoted 3 times

✉  **WASSIM2020** 2 years, 7 months ago

Correct answer <https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/sample-softphone-integration#:~:text=A%20softphone%20dialer%20provides%20a,activity%20in%20Dynamics%20365%20Sales>.

   upvoted 3 times

## Question 38

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

ET User:

User

User

<https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/define-general-properties-scheduling-forecast>

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

CP14 **Highly Voted** 2 years, 8 months ago

Should be User for both.

<https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/define-general-properties-scheduling-forecast>

upvoted 17 times

Gosainnehal **Highly Voted** 1 year, 3 months ago

It should be USER AND USER, To set up a hierarchy, you would choose the manager at the Top of the hierarchy, it will bring your organization hierarchy.  
<https://docs.microsoft.com/en-us/dynamics365/sales/define-general-properties-scheduling-forecast>

upvoted 5 times

✉ **lakshmig** Most Recent 2 years, 1 month ago

Hierarchy route indicates entity type and Owner is the attribute in the Opportunity entity type 'User'. hence 1st answer is USER  
2. To set viewing permissions

In the User security field section, choose User lookup field. Choosing this field determines the owner of the forecast row. The following default system user value is selected based on the template:

For Org chart forecast, the value is selected as User.  
For Territory forecast, the value is selected as Manager

HENCE 2ND ANSWER IS USER

Like Upvote Flag upvoted 3 times

✉ **SKpl200** 2 years, 3 months ago

User as the hierarchy, and Created By as the field (as that is usually the Owner of the Opp record)  
Like Upvote Flag upvoted 2 times

✉ **Hmelin23** 2 years, 3 months ago

Owner and User - correct  
<https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/define-general-properties-scheduling-forecast>  
<https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/provide-permissions-forecast>

Like Upvote Flag upvoted 3 times

✉ **JdH** 2 years, 4 months ago

Both User..  
<https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/define-general-properties-scheduling-forecast>

Like Upvote Flag upvoted 3 times

✉ **Lemppy** 2 years, 4 months ago

I think the answer could also be Owner. If the question was about entity, the answer would be User. If the question was about a field, it could be Manager or Owner. But the question has "route" in it. Very obscure. The configuration step named "Rollup to hierarchical entity" could be considered as "route". Then the answer would be Owner, I think.

Like Upvote Flag upvoted 1 times

✉ **berex** 2 years, 5 months ago

Hierarchy Entity is locked to User when you select Org Forecast so its can't be Manager.

Like Upvote Flag upvoted 1 times

✉ **jkaur** 2 years, 6 months ago

User and User

Like Upvote Flag upvoted 4 times

✉ **SeekerShan** 2 years, 7 months ago

So the answer is User and User?

Like Upvote Flag upvoted 2 times

✉ **dkdevaloper** 2 years, 8 months ago

The resource link is not working under the question

Like Upvote Flag upvoted 1 times

Like Upvote Flag upvoted 2 times

✉ **dkdevaloper** 2 years, 8 months ago

Is this correct?

Like Upvote Flag upvoted 2 times

ET Answer:

## Answer Area

### Requirement

Hierarchical route

	▼
Owner	
User	
Contact	
Manager	

### Permissions - User Lookup field

	▼
User	
Manager	
Created By	
None	

## Question 39

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	<table border="1"><tr><td>Lead</td></tr><tr><td>Quote</td></tr><tr><td>Opportunity</td></tr><tr><td>Invoice</td></tr></table>	Lead	Quote	Opportunity	Invoice
Lead					
Quote					
Opportunity					
Invoice					
Date field	<table border="1"><tr><td>Actual Close Date</td></tr><tr><td>Created on Date</td></tr><tr><td>Final Decision Date</td></tr></table>	Actual Close Date	Created on Date	Final Decision Date	
Actual Close Date					
Created on Date					
Final Decision Date					
Revenue field	<table border="1"><tr><td>Total Amount</td></tr><tr><td>Budget Amount</td></tr><tr><td>Actual Revenue</td></tr></table>	Total Amount	Budget Amount	Actual Revenue	
Total Amount					
Budget Amount					
Actual Revenue					

Answer:

## Answer Area

Parameter	Option								
Entity	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 2px;">Lead</td> <td style="width: 20px; text-align: right; vertical-align: bottom;"></td> </tr> <tr> <td style="padding: 2px;">Quote</td> <td style="width: 20px; text-align: right; vertical-align: bottom;"></td> </tr> <tr style="background-color: #90EE90;"> <td style="padding: 2px;">Opportunity</td> <td style="width: 20px; text-align: right; vertical-align: bottom;"></td> </tr> <tr> <td style="padding: 2px;">Invoice</td> <td style="width: 20px; text-align: right; vertical-align: bottom;"></td> </tr> </table>	Lead		Quote		Opportunity		Invoice	
Lead									
Quote									
Opportunity									
Invoice									
Date field	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 2px;">Actual Close Date</td> <td style="width: 20px; text-align: right; vertical-align: bottom;"></td> </tr> <tr> <td style="padding: 2px;">Created on Date</td> <td style="width: 20px; text-align: right; vertical-align: bottom;"></td> </tr> <tr style="background-color: #90EE90;"> <td style="padding: 2px;">Final Decision Date</td> <td style="width: 20px; text-align: right; vertical-align: bottom;"></td> </tr> </table>	Actual Close Date		Created on Date		Final Decision Date			
Actual Close Date									
Created on Date									
Final Decision Date									
Revenue field	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 2px;">Total Amount</td> <td style="width: 20px; text-align: right; vertical-align: bottom;"></td> </tr> <tr> <td style="padding: 2px;">Budget Amount</td> <td style="width: 20px; text-align: right; vertical-align: bottom;"></td> </tr> <tr style="background-color: #90EE90;"> <td style="padding: 2px;">Actual Revenue</td> <td style="width: 20px; text-align: right; vertical-align: bottom;"></td> </tr> </table>	Total Amount		Budget Amount		Actual Revenue			
Total Amount									
Budget Amount									
Actual Revenue									

**Veektoreeous** 2 years, 8 months ago

The question has the answers, if you read it carefully  
 upvoted 16 times

**lakshmig** 2 years, 1 month ago

QUESTION HAS ANSWERS  
 upvoted 6 times

**Kratinhos** 1 year, 3 months ago

On exam 27/4/22. Passed. I selected same answers  
 upvoted 1 times

**V1SHAL** 2 years ago

In Exam today  
 upvoted 1 times

**SKpl200** 2 years, 3 months ago

Total Amount assumes there are Products associated to the Opp, Actual Revenue is the value copied from Est. Revenue when Opp is closed - so to be safe, we should rely on Actual Revenue instead no...?  
 upvoted 2 times

**jkaur** 2 years, 6 months ago

correct  
 upvoted 2 times

**dkdeveloper** 2 years, 8 months ago

Why it is not Actual revenue?  
 upvoted 1 times

Never mind, it should be total amount.

upvoted 1 times

## Question 40

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.

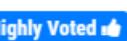
You need to configure the price lists for the territories.

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.

Answer: C

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

  **SKpl200**  2 years, 3 months ago

Correct - there is a connection relationship called Territory Relationship  
(who knew)

   upvoted 7 times

  **Kratinhos**  1 year, 3 months ago

On exam 27/4/22. Passed. I selected same answers  
   upvoted 1 times

  **V1SHAL** 2 years ago

In Exam today  
   upvoted 4 times

## Question 41

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

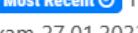
Answer: C

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

✉️  **SKpl200**  2 years, 3 months ago

Correct- it will use the currency of the price list (USD)

   upvoted 6 times

✉️  **prpr3**  1 year, 6 months ago

On the exam 27.01.2022

   upvoted 2 times

✉️  **ryan\_hoang4949** 2 years ago

You can change the quote currency to EUR if you have configured EUR in currencies settings with an automatically updated exchange rate. WHY NOT EUR?

   upvoted 1 times

✉️  **Khleos** 1 year, 11 months ago

United Kingdom uses Pounds and Spain uses Euro, so it has to be USD to make the conversion imo

   upvoted 4 times

✉️  **ad3791** 2 years, 2 months ago

on exam

   upvoted 3 times

## Question 42

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

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

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

You need to create the duplicate detection rules.

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

NOTE: Each correct selection is worth one point.

- A. First Name and Last Name and Email
- B. First Name and Last Name and Preferred Phone
- C. First Name and Last Name and Email and Business Unit
- D. First Name and Last Name and Preferred Phone and Business Unit
- E. First Name and Last Name and Owner

Answer: CD

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

✉  **SKpl200**  2 years, 3 months ago

Correct - C looks at email AND BU, and D looks at phone AND BU

   upvoted 8 times

✉  **Vin22CRM**  1 month, 3 weeks ago

Very F obvious

   upvoted 1 times

✉  **prpr3** 1 year, 6 months ago

On the exam 27.01.2022

   upvoted 1 times

✉  **ryan\_hoang4949** 2 years ago

Is it not obvious? :D

   upvoted 2 times

✉  **V1SHAL** 2 years ago

In Exam today

   upvoted 1 times

✉  **lakshmig** 2 years, 1 month ago

above answers are CORRECT i feel , as these combinations covers all criteria for duplicate identification

   upvoted 1 times

✉  **erikajasso** 2 years, 2 months ago

Why Business Unit? When configuring the duplicate detection rules, you cannot put the BU as part of the selection, the issue that users can see only the BU contacts is done by security roles

   upvoted 3 times

✉  **Ch3mi** 2 years, 1 month ago

"Business unit" is not listed on criteria, but you can find "Owning business unit" which is the same and suggested answers are correct.

   upvoted 2 times

✉  **ChinhP** 2 years, 1 month ago

Same idea with you

   upvoted 1 times

## Question 43

Sales representatives at an organization have access to the contact records in their business unit.

You need to ensure that sales representatives can access contact records in all business units that are subordinate to their business unit. Sales representatives must not have access to other records in the organization.

Which access level should you assign to the Contact entity?

- A. User
- B. Organization
- C. Parent: Child Business Unit
- D. Business Unit

Answer: C

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

✉  **lakshmig**  2 years, 1 month ago

CORRECT

   upvoted 6 times

✉  **Vin22CRM**  1 month, 3 weeks ago

Ans rite

   upvoted 1 times

✉  **ceejaybee** 1 year, 2 months ago

In exam, Jun-22. Passed. I selected same answer. That doesn't mean I got this particular answer correct :)

   upvoted 1 times

✉  **Kratinhos** 1 year, 3 months ago

On exam 27/4/22. Passed. I selected same answer

   upvoted 1 times

✉  **SKpl200** 2 years, 3 months ago

Correct

   upvoted 3 times

## Question 44

A company uses special pricing for bulk purchases of products.

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

You need to set up a discount price list.

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

NOTE: Each correct selection is worth one point.

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

Answer: BCD

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

✉ **Ross22** Highly Voted 2 years, 2 months ago

"Make sure that you have the Manager, Vice President, CEO-Business Manager, System Administrator, or System Customizer security role or equivalent permissions." When setting up discount lists.

upvoted 12 times

✉ **No\_Doubt** Most Recent 5 months, 3 weeks ago

Selected Answer: BCD

Correct answer

upvoted 1 times

✉ **lakshmi9** 2 years, 1 month ago

Looks correct

upvoted 1 times

✉ **SKpl200** 2 years, 3 months ago

The given answer is correct.

upvoted 2 times

✉ **rjohn** 2 years, 3 months ago

The Vice president would be able to, but not the President.. crap stuff.

The link points to the page mentioning President and Vice President, but not Of Sales !

upvoted 2 times

**Eirikafe** 1 year, 10 months ago

President role doesn't exist out of box for Dynamics 365 for Sales

upvoted 1 times

**SKpl200** 2 years, 3 months ago

Maybe Presidents has better/more important things to do that set up discount list, so its assumed the VP is to do the boring stuff...

upvoted 2 times

## Question 45

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.

Hot Area:

### Answer Area

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

Answer:

### Answer Area

Requirement	Setting
Determine the number of territories.	<ul style="list-style-type: none"><li>Four territories and zero sub-territories</li><li>Two territories and two sub-territories</li><li><b>One territory and three sub-territories</b></li><li>One territory and four sub-territories</li></ul>
Determine how many territories in which the Jacksonville salespeople should be members.	<ul style="list-style-type: none"><li>One territory and one sub-territory: Florida and Jacksonville</li><li><b>One sub-territory: Jacksonville</b></li><li>Two territories: Florida and Jacksonville</li><li>One territory: Florida</li></ul>
Determine how many territories the Florida sales manager should manage	<ul style="list-style-type: none"><li>One territory and zero sub-territory: Florida</li><li><b>One territory and three sub-territories: Florida, Jacksonville, Miami, and Tampa</b></li><li>Four territories: Florida, Jacksonville, Miami, and Tampa</li><li>Zero territories and three sub-territories: Jacksonville, Miami, and Tampa</li></ul>

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

✉  **Kratinhos**  1 year, 3 months ago

On exam 27/4/22. Passed. I selected same answer

   upvoted 5 times

✉  **Guischuk**  1 year ago

Sorry, but if i have well understand the question, the last answer should be One territory Florida and 0 sub-territories. In the link, it is indicated : " Important : You can't allocate the same user to multiple territories. If you need to assign a user to a larger area (more than one existing territory), create a new territory that includes the existing territories, and then assign the user to that new territory." What do you think?

   upvoted 2 times

✉  **SharjeelButt** 1 year ago

Is what you're saying the same thing as: if user is assigned to one territory, that user has visibility over all the sub-territories within that territory? Because that's how I understood the question and I agree with you that the last answer should be One territory: Florida.

   upvoted 2 times

✉  **EslamKhattab** 1 year, 3 months ago

On exam

   upvoted 2 times

## Question 46

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

Answer: A

  Kratinhos 1 year, 3 months ago

On exam 27/4/22. Passed. I selected same answer (A)

   upvoted 4 times

  dpietrnaniuk 2 years ago

I believe that the only correct answers isSales manager and system customizer but since the principle of least privileges is required, SALES MANAGER is the correct answer.

   upvoted 4 times

  [Removed] 2 months, 3 weeks ago

System Customizer cannot assign territories if I'm not mistaken. Can only be Sales Manager from the options provided

   upvoted 1 times

  lakshmig 2 years, 1 month ago

as per this statement i have found "

Important: Out of the box (default) security roles required to create Sales Territories and assign a salesperson to Sales Territories are Account Manager, Sales Manager, Vice President of Sales, CEO-Business Manager, System Administrator security role or equivalent permissions.

The System customizer security role cannot create a sales territory but can read and write (modify) it. Also, System customizer cannot assign a salesperson (user) to a sales territory."

ANSWER is SALES MANAGER as System customizer CANT ASSIGN SALES PERSON to sales territory

   upvoted 4 times

  ad3791 2 years, 2 months ago

on exam

   upvoted 2 times

## Question 47

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

Answer: B

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

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

 **MattEstillore**  1 year, 1 month ago

Correct.

There can be no more than 10 activated business process flow processes per entity. Each process can contain no more than 30 stages.

Multi-entity processes can contain no more than five entities.  
and up to 30 steps each stage

   upvoted 8 times

 **[Removed]** 2 months, 3 weeks ago

100% correct

   upvoted 1 times

## Question 48

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	Leads owned by people in your business unit only Leads owned by you only Leads owned by anyone in your organization
Assign leads to other users	Leads owned by your business unit and its child business units only Leads owned by people in your business unit only Leads owned by anyone in your organization

Answer:

### Answer Area

Scenario	Privilege
Add notes to leads	Leads owned by people in your business unit only Leads owned by you only Leads owned by anyone in your organization
Assign leads to other users	Leads owned by your business unit and its child business units only Leads owned by people in your business unit only Leads owned by anyone in your organization

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

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

✉️👤 **yakusaclan** Highly Voted 1 year, 9 months ago

1- "Add notes to leads" is an append privilege that is why 'Leads owned by people in your business unit only' is correct

👉👎👉 upvoted 14 times

✉️👤 **Newbie007** 5 days, 18 hours ago

In order to successfully append record A to record B, the security privileges must be set to allow both sides of the agreement. Consider the following metaphor, Append (NOTES) 'knocks on the door' of another entity and Append To (LEADS) is needed to 'open the door' to that entity. Both append to and append are enabled for both leads and notes tables (entity)

👉👎👉 upvoted 1 times

✉️👤 **mrabikr26** 8 months, 1 week ago

Read privileges is not mentioned.. How the Leads owned by people in your business unit is visible to user (if assume it as user level) then answer will be "Leads owned by the user only", (if assuming read privileges as BU or ORg) then this will be correct.

👉👎👉 upvoted 1 times

✉  **An01234** 1 year, 3 months ago

Thanks! I finally understood why  
   upvoted 2 times

✉  **hxwinchester**  1 year, 11 months ago

Shouldn't be the first one applicable to Leads owned by the user only?  
   upvoted 9 times

✉  **lifewithbandit** 1 year, 10 months ago

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

Read the first bullet point. :)

   upvoted 1 times

✉  **Newb007** 5 days, 18 hours ago

ill explain....In order to successfully append record A to record B, the security privileges must be set to allow both sides of the agreement. Consider the following metaphor, Append (NOTES) 'knocks on the door' of another entity and Append To (LEADS) is needed to 'open the door' to that entity. Both append to and append are enabled for both leads and notes tables (entity)

   upvoted 1 times

✉  **Newb007** 5 days, 18 hours ago

answer is correct

   upvoted 1 times

✉  **ceejaybee** 1 year, 8 months ago

not much point in repeating the question, without commenting on what you think the answer is

   upvoted 20 times

✉  **EgycrmDev**  1 year ago

Correct

   upvoted 2 times

✉  **atilakill92** 1 year, 2 months ago

Add a note in the timeline is requiring create privilege and not append. It should be the user

   upvoted 1 times

✉  **SashM** 1 year, 4 months ago

INCORRECT.

Should be i) leads own by use  
ii) leads own by business unit

   upvoted 2 times

✉  **SharjeelButt** 1 year ago

Wrong. "Add notes to leads" is an Append privilege. That is why 'Leads owned by people in your business unit only' is correct

   upvoted 2 times

✉  **Meetya** 1 year, 10 months ago

On exam

   upvoted 2 times

## Question 49

A company uses Dynamics 365 Sales Professional.

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

You need to assign the appropriate default security role.

Which security role should you assign to the user?

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

Answer: A

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

<https://learn.microsoft.com/en-us/dynamics365/sales/security-roles-for-sales>

✉️  **Meetya** Highly Voted 1 year, 11 months ago

I think it is correct:

"To allow users access to Dynamics 365 Sales Professional, you must assign the 'Sales Professional app access' security role (if Sales Professional version is 9.1.2101.1501 or later) and at least one more security role to the users."

   upvoted 9 times

✉️  **zukito3** 1 year, 10 months ago

Correct!

   upvoted 1 times

✉️  **Newb007** Most Recent 5 days, 18 hours ago

Correct <https://learn.microsoft.com/en-us/dynamics365/sales/security-roles-for-sales>

   upvoted 1 times

✉️  **JoeS007** 1 year, 8 months ago

That role doesn't exist in my environment. Its called "Sales, Enterprise app access".

   upvoted 3 times

✉️  **Zbenhallam** 1 year, 5 months ago

Cuz you have a Sales ENTERPRISE license not a Sales PROFESSIONAL license

   upvoted 3 times

## Question 50

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:

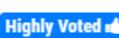
Actions	Answer Area
Navigate to Opportunities and select the Flow option.	
Select a Business Process Flow.	
Navigate to Processes.	
Edit the Process name.	

ET User:

Navigate to Processes

Select a business process flow

Edit the process flow name

  GaneshChowhan400  1 year, 11 months ago

Navigate to Processes

Select a BPF

Edit process

   upvoted 51 times

  muntu1 1 year, 8 months ago

Yes the above sequence is the correct one; Navigate to Processes > Select a BPF > Edit Process

   upvoted 1 times

  zukito3 1 year, 10 months ago

Correct

   upvoted 1 times

  Kratinhos  1 year, 3 months ago

On exam 27/4/22. Passed. I selected

Navigate to Processes

Select a business process flow

Edit the business process flow name

   upvoted 3 times

ET Answer:

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

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

## Question 51

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.	<table border="1"><tr><td>Settings</td></tr><tr><td>Activities</td></tr><tr><td><b>Templates</b></td></tr><tr><td>Categories</td></tr></table>	Settings	Activities	<b>Templates</b>	Categories
Settings					
Activities					
<b>Templates</b>					
Categories					
Set up record types for playbooks.	<table border="1"><tr><td>Accounts and Contacts</td></tr><tr><td>Phone calls and Appointments</td></tr><tr><td><b>Accounts, Contacts, and Activities</b></td></tr><tr><td>Accounts, Contacts, and Sales literature</td></tr></table>	Accounts and Contacts	Phone calls and Appointments	<b>Accounts, Contacts, and Activities</b>	Accounts, Contacts, and Sales literature
Accounts and Contacts					
Phone calls and Appointments					
<b>Accounts, Contacts, and Activities</b>					
Accounts, Contacts, and Sales literature					

Answer:

### Answer Area

Requirement	Configuration				
Set up playbooks for tracking activities.	<table border="1"><tr><td>Settings</td></tr><tr><td>Activities</td></tr><tr><td><b>Templates</b></td></tr><tr><td>Categories</td></tr></table>	Settings	Activities	<b>Templates</b>	Categories
Settings					
Activities					
<b>Templates</b>					
Categories					
Set up record types for playbooks.	<table border="1"><tr><td>Accounts and Contacts</td></tr><tr><td>Phone calls and Appointments</td></tr><tr><td><b>Accounts, Contacts, and Activities</b></td></tr><tr><td>Accounts, Contacts, and Sales literature</td></tr></table>	Accounts and Contacts	Phone calls and Appointments	<b>Accounts, Contacts, and Activities</b>	Accounts, Contacts, and Sales literature
Accounts and Contacts					
Phone calls and Appointments					
<b>Accounts, Contacts, and Activities</b>					
Accounts, Contacts, and Sales literature					

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

✉  **hxwinchester**  1 year, 11 months ago

Correct.

1. You can set Track Progress switch in the Playbook template.
2. Playbook can be applied to Account, Contacts, Lead, Opportunity, Orders, Quote and Invoice.

   upvoted 18 times

✉  **pumpkin2**  1 year, 5 months ago

On exam March 2022

   upvoted 2 times

✉  **Meetya** 1 year, 10 months ago

On exam

   upvoted 4 times

## Question 52

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

ET User: AC/CE

<https://docs.microsoft.com/en-us/dynamics365/sales/manage-teams?tabs=salespro>

✉ **DJ26** Highly Voted 1 year, 11 months ago

The correct answers are Team name and Administrator! Both are required!

1 like, 2 retweets, 1 favorite upvoted 20 times

✉ **ceejaybee** 1 year, 2 months ago

Team Name and Administrator are correct. The ref link provided states that, for Sales Professional, the BU will be automatically populated with Org name; you can't even update the BU field as it's locked

1 like, 2 retweets, 1 favorite upvoted 4 times

✉ **JoeS007** 1 year, 8 months ago

It depends on the license type. The question specifies Sales Professional, so the given answer is correct for that license type. For Premium and Enterprise licenses Team Name, BU, Administrator and Type are required.

1 like, 2 retweets, 1 favorite upvoted 10 times

✉ **AAR75** 1 year, 3 months ago

I agree, it clearly states that sales manager will be responsible for adding members and removing members from the team.

1 like, 2 retweets, 1 favorite upvoted 2 times

✉ **hxwinchester** Highly Voted 1 year, 11 months ago

Based on the link provided, answers are correct.

1 like, 2 retweets, 1 favorite upvoted 7 times

✉ **SashM** 1 year, 4 months ago

Yes, Correct

1 like, 2 retweets, 1 favorite upvoted 1 times

✉ **Ghalandor90** Most Recent 4 days, 4 hours ago

**Selected Answer: AC**

"The sales manager will be responsible for adding members and removing members from the team." The answer is AC

1 like, 2 retweets, 1 favorite upvoted 1 times

✉ **Svamsi** 1 month, 3 weeks ago

Team name and administrator are mandatory to fill. Business unit and team type will auto populate.

1 like, 2 retweets, 1 favorite upvoted 2 times

- ✉ **Svamsi** 1 month, 3 weeks ago  
Team name and administrator are mandatory to fill. Business unit and team type will auto populate.  
 upvoted 2 times
- ✉ **[Removed]** 2 months, 3 weeks ago  
To create a team:  
- In the site map, select Sales settings.  
- Under Advanced settings, select Team management.
- Select Create a team.  
- In the Add New Team pane, enter the following details, and then select Add.  
- Team Name: Name of the team.  
- Business Unit Name: This defaults to your organization name.  
- Team Description: Enter a description of what the team has been created for.  
- Select Team Administrator: Select the person who will do the team administration, such as adding members to or removing members from the team.  
 upvoted 1 times
- ✉ **19RPJY** 5 months, 3 weeks ago  
**Selected Answer: CE**  
Because Only team Name and Business Unit Is mandatory  
 upvoted 2 times
- ✉ **Sickkgb** 1 month, 3 weeks ago  
Business unit is auto populated to your Org name, So as per the question you will have to configure Administrator and team name.  
 upvoted 1 times
- ✉ **RomeuSouza** 10 months ago  
**Selected Answer: AC**  
Team name and Administrator - is correct  
 upvoted 1 times
- ✉ **rjamp** 11 months, 3 weeks ago  
Based on the link provided and for Sales Professional, the correct answers are team Name (Required) and Team administrator (For adding members). Bu can't be overwritten out-of-the-box (This defaults to your organization name)  
 upvoted 1 times
- ✉ **EgycrmDev** 1 year ago  
According to MS doc  
Team name, Bu name , admin  
All of these are mandatory  
 upvoted 1 times
- ✉ **Jurka** 1 year, 2 months ago  
**Selected Answer: CE**  
For the Sales Professional license the answer is right.  
<https://docs.microsoft.com/en-us/dynamics365/sales/manage-teams?tabs=salespro>  
 upvoted 2 times
- ✉ **SashM** 1 year, 4 months ago  
**Selected Answer: CE**  
Based on Link provided.  
 upvoted 2 times
- ✉ **GaneshChowhan400** 1 year, 11 months ago  
Team Name,  
Team Administrator  
 upvoted 2 times
- ✉ **StudyGuyUltra** 1 year, 10 months ago  
Situation demands the sales managed as a team administrator  
 upvoted 2 times
- ✉ **MJFG** 1 year, 11 months ago  
Correct answer would be Team Name and Team description because Business Unit Name is by default the organization name  
 upvoted 2 times
- ✉ **jth** 1 year, 11 months ago  
Team description is not a required field. Neither is Team Administrator. Only two required fields are Team Name and Business Unit Name. Given answer is correct  
 upvoted 14 times

ET Answer: CE

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

Bing:

According to the information I found, to create a new sales team in Dynamics 365 Sales Professional, you must configure the **Team Name** and the **Business Unit Name** <sup>1</sup>. The Team Name is the name of the team that you are creating, and the Business Unit Name is the name of the business unit to which the team belongs. So, out of the options you provided, the correct answers are **C. Team name** and **E. Business unit name**. Is there anything else I can help you with? 😊

## Question 53

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

Answer:

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

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

✉  **DJ26**  1 year, 11 months ago

1. Open Settings
2. Open Business Management
3. Configure Automatic Record and Update Rules

   upvoted 16 times

✉  **Meetya** 1 year, 11 months ago

Correct

   upvoted 3 times

✉  **Yvon**  10 months ago

Yes, good answer

Check this link

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

   upvoted 2 times

✉  **SharjeelButt** 1 year ago

Correct

   upvoted 1 times

## Question 54

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

Answer: D

- ✉  **ceejaybee**  1 year, 2 months ago

OMG how many times is this question going to keep reappearing

   upvoted 10 times
- ✉  **Killerbie** 6 months, 1 week ago

xD" LOL

   upvoted 1 times
- ✉  **Pieter741**  2 months, 1 week ago

Damn this question keeps coming back. It should be Sales manager imo.

   upvoted 1 times
- ✉  **[Removed]** 2 months, 4 weeks ago

**Selected Answer: D**

D for sure

   upvoted 1 times
- ✉  **SohailG** 1 year, 8 months ago

**Selected Answer: D**

D is Correct answer

   upvoted 1 times

## Question 55

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	Answer Area
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:

## Action

Add steps to stage.

Choose Business Process Flow.

Add a stage.

Activate processes.

## Answer Area

Choose App Settings.

Add Playbook templates.

Add activities.

Publish the solution.



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

✉ **moodi86** 1 year, 7 months ago  
should be publish the template not the solution  
 upvoted 6 times

✉ **[Removed]** 2 months, 4 weeks ago  
Correct  
 upvoted 1 times

✉ **EgycrmDev** 1 year, 1 month ago  
Answer is correct  
 upvoted 1 times

## Question 56

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

ET User:

In Advanced Settings, select the correct setting.

Change the Kanban type to a Business Process Flow.

Drag the opportunity to another column.

✉ estrelle2008 1 year, 3 months ago

Set up Kanban.  
Advanced Settings > Customize > Customize the System > Select Entities > Select Opportunity > Select Tab Control > Add Control > Navigate to Kanban > Add Kanban control  
Answer: In Advanced Settings, select the correct setting

View the opportunities in the sales cycle? Guessing Kanban in Business Process Flow is meant here, and not Kanban in Oppty status, as there are no more Kanban flavours at the moment.  
Answer should then be: Change the Kanban type to a Business Process Flow.

Change the status to the same status view? Guessing "change the opportunity status in the Kanban Status view" is meant here.  
Answer should then be: Drag the oppty to another column.

upvoted 11 times

✉ LukasLu 1 year, 3 months ago

Agreed. The given answer for Setup Kanban is ridiculous. Someone's given it for correction :))

upvoted 1 times

✉ Gill 4 months ago

This answer given is in the documentation. But it seems that the documentation is now out of date. Even with a very small window the Show As option does not appear.

upvoted 1 times

✉ To.bi 10 months ago

"You add the Kanban control to the Opportunity entity." So it is already added. Even if you don't activate the PCF control "Kanban" by clicking the checkmark via system customization, you are able to select "Show as" --> "Kanban" via the command bar.  
--> Set up Kanban = via command bar is correct

upvoted 4 times

✉ RomeuSouza 10 months ago

Is correct. "Sales Cycle" to me are the status reason, not BPF stages.

upvoted 1 times

✉ JudT 2 months ago

A sales cycle is made up of a series of stages that go from the initial contact to the closing of a sale ( Qualify > Develop > Propose > Close ..... So BPF)

upvoted 1 times

✉ Gosainsnehal 1 year, 3 months ago

In Advanced Settings, select the correct setting  
Change the Kanban type to a Business Process Flow,  
Drag the oppty to another column

upvoted 3 times

ET Answer:

## Answer Area

### Requirement

### Action

Set up Kanban.

In App Settings, select the correct setting.  
On the View menu, select the correct view.  
In Advanced settings, select the correct setting.  
On the command bar, select Show As, and then select the correct setting.

View the opportunities in the sales cycle.

Change the Kanban type to Status.  
Change the view to All Opportunities.  
Change the view to Partner Opportunities.  
Change the Kanban type to a business process flow.

Change the status to the same status view.

Drag the opportunity to another column.  
Create a new opportunity with the correct status.  
Drag the opportunity to the bottom of the column.  
Create a lead and quality the lead with the new status.

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

## Question 57

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	
Timeline	Related opportunities	
Assistant		
Quick View form	Notes and activities	

ET User:

Quick View

Sub-grid

Timeline

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

✉  **AlexandraMSilva**  1 year, 3 months ago

Correct Answer is:

Quick View Form (<https://docs.microsoft.com/en-us/power-apps/maker/model-driven-apps/quick-view-control-properties-legacy>)

Subgrid - You will add a list view on the form for related opportunities

Timeline (correct)

   upvoted 22 times

✉  **choyo**  1 year, 2 months ago

Quick View

Sub-grid

Timeline

   upvoted 8 times

 **[Removed]** 2 months, 4 weeks ago

Quick View Form - to display the two fields  
Sub-Grid - to list the related opportunities  
Timeline - to show the activities

   upvoted 2 times

ET Answer:

## Answer Area

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

<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 58

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.

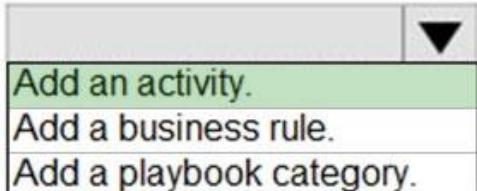
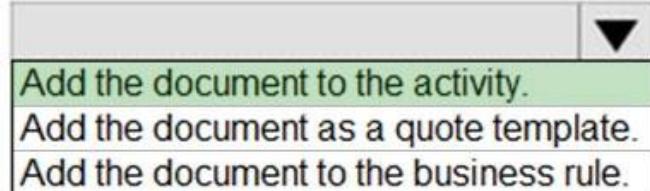
Hot Area:

### Answer Area

Requirement	Action
Follow-up contact	<div style="border: 1px solid black; padding: 5px; width: fit-content; margin-left: auto; margin-right: auto;"><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; width: fit-content; margin-left: auto; margin-right: auto;"><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>

Answer:

## Answer Area

Requirement	Action
Follow-up contact	 <ul style="list-style-type: none"><li>Add an activity.</li><li>Add a business rule.</li><li>Add a playbook category.</li></ul>
Sales Manager checklist	 <ul style="list-style-type: none"><li>Add the document to the activity.</li><li>Add the document as a quote template.</li><li>Add the document to the business rule.</li></ul>

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

<https://learn.microsoft.com/en-us/dynamics365/sales/associate-documents-playbook-activities>

 **Yvon** 9 months, 2 weeks ago

Yes, correct, this Microsoft link confirm

<https://learn.microsoft.com/en-us/dynamics365/sales/associate-documents-playbook-activities>

   upvoted 3 times

 **Pradeep766** 1 year ago

It's seems correct

   upvoted 1 times

## Question 59

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.	

Answer:

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

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

✉  **Gosaisnehal**  1 year, 3 months ago

The given answer is in the correct order.

It could be also Create a new territory, replace the manager for sales Territory A, associate the replaced manager to sales territory B, and add members.

The trick is one manager can't be associated with two territories.

   upvoted 8 times

✉  **Gill**  4 months ago

Changing the name of the territory is garbage.

You can only associate the manager with Sales Territory B AFTER he has been removed from A

So as long as Replace the Manager from SalesTerritoryA with another manager comes before Associate the manager from SalesTerritoryA, and create the new territory comes before Add Members and Associate the manager from SalesTerritoryA, pretty much any order will work

   upvoted 1 times

✉  **clausi** 1 year, 1 month ago

in exam

   upvoted 2 times

✉  **revanurulakshmi** 1 year, 2 months ago

As given in the question, create new sales territory, then it will be sales territory B:

   upvoted 1 times

✉  **zxc1234** 1 year, 3 months ago

Is this right? in the answer ,there is not SalesTerritoryB.

anyone can help me?

thanks.

   upvoted 1 times

✉  **Abcdaire94** 6 months, 2 weeks ago

You create a new territory, which will be this SalesTerritoryB.

   upvoted 1 times

## Question 60

You run a bicycle parts company that uses a proprietary cloud ERP system, Dynamics 365 Sales, and an inventory system.

You need to create visualizations that meet the following requirements:

- ⇒ Consolidate data from all three systems.
- ⇒ Provide users with a deeper understanding of customers spending habits.

Which application should you use?

- A. Sales Insights
- B. Project Operations
- C. Customer Service Insights
- D. Audience insights

Answer: D

<https://docs.microsoft.com/en-us/dynamics365/customer-insights/audience-insights/overview>

<https://us.hso.com/blog/microsoft-dynamics-365-customer-insights-heres-what-it-is-and-6-reasons-you-should-care/>

✉️👤 Newb007 1 week ago

key word is spending habits.. plus in Microsoft Learn they talk about Sales Insights.... Customer service is more about relationships with customers etc.. MY gut says its sales insights

👍👎👎 upvoted 1 times

✉️👤 niyazuki 2 weeks, 5 days ago

Asked ChatGPT as I was confused by the other comments here, and I got this answer:

Sales Insights is a component of Dynamics 365 that is designed to provide advanced analytics and insights related to sales data. It allows you to consolidate data from multiple sources, including Dynamics 365 Sales and other systems, to gain a deeper understanding of customer behavior and spending habits. With Sales Insights, you can create visualizations and reports that help you analyze sales trends, customer interactions, and other relevant metrics, which aligns with your requirement to provide users with a deeper understanding of customers' spending habits.

👍👎👎 upvoted 1 times

✉️👤 niyazuki 2 weeks, 5 days ago

Based on the requirements you provided, option A, Sales Insights, seems to be the most appropriate choice for creating visualizations that consolidate data from your proprietary cloud ERP system, Dynamics 365 Sales, and an inventory system to gain a deeper understanding of customer spending habits.

👍👎👎 upvoted 1 times

✉️👤 No\_Doubt 5 months, 3 weeks ago

There is nothing called "Customer Service Insights", it's called "Customer Insights"  
In the other hand, "Audience Insights" is a capability of the "D365 Customer Insights"  
The provided answer is correct.

👍👎👎 upvoted 2 times

✉️👤 dalones213 9 months, 2 weeks ago

Customer Service Insights is the same thing with Customer Insights?

👍👎👎 upvoted 1 times

✉️👤 hiranom 11 months ago

Audience insights is in Customer insights.

👍👎👎 upvoted 1 times

✉️👤 MARIANA123 11 months, 1 week ago

Wouldn't it be customer insights?

👍👎👎 upvoted 1 times

✉️👤 ceejaybee 1 year, 2 months ago

In exam, Jun-22 (similar question, not exactly the same; it would be useful to read up on all of the "Insights" products to see what they allow you to do)

👍👎👎 upvoted 3 times

Bing: D

You should use **Audience insights** to consolidate data from all three systems and provide users with a deeper understanding of customers' spending habits. Audience insights is a capability of Dynamics 365 Customer Insights that combines data to create a high-level view of your customer. Audience Insights uses prebuilt connectors to bring in the most important data, allowing you to eliminate data silos and gain a unified view of your customer profile [1](#). So, the correct answer is D. Audience insights. Is there anything else you would like to know? 😊

## Question 61

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

Information	Option
Employees	<ul style="list-style-type: none"><li>Subgrid</li><li>Composite column</li><li>Section</li><li>Event</li></ul>
Address	<ul style="list-style-type: none"><li>New column</li><li>Existing column</li><li>Composite column</li><li>Section</li></ul>
Email	<ul style="list-style-type: none"><li>Category</li><li>Monitoring</li><li>Track progress</li></ul>

- Subgrid
- Composite column
- Section
- Event

- New column
- Existing column
- Composite column
- Section

- Category
- Monitoring
- Track progress

ET User:

Subgrid

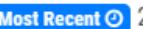
Composite column

Category

✉  **AAR75**  1 year, 3 months ago

Company employees are contacts. So answer for 1st is subgrid.

   upvoted 19 times

✉  **Pieter741**  2 months, 1 week ago

Does anybody know why the last one is category?

   upvoted 1 times

✉  **Gill** 4 months ago

Can anyone explain the answers for Q3. How does a category help?

   upvoted 1 times

✉  **niyazuki** 1 month, 3 weeks ago

The "Category" option allows you to create multiple instances of a field, each with a different label. This can be useful for situations where you need to capture similar types of data multiple times, such as multiple email addresses in this case.

   upvoted 2 times

✉  **MARIANA123** 11 months, 1 week ago

Subgrid

Composite column

Category

   upvoted 3 times

✉  **clausi** 1 year, 1 month ago

on exam

   upvoted 2 times

✉  **CNeep** 1 year, 1 month ago

What did you answer? Did you pass?

   upvoted 1 times

✉  **ceejaybee** 1 year, 2 months ago

In exam, Jun-22

   upvoted 1 times

✉  **Kratinhos** 1 year, 3 months ago

On exam 27/4/22. Passed. I selected same answers

   upvoted 2 times

✉  **ceejaybee** 1 year, 2 months ago

But you don't see the individual pass/fail for each question you answered, you only get an overall pass/fail result? So you don't know whether this particular answer was correct?

   upvoted 11 times

✉  **isuruudara** 5 months, 3 weeks ago

exactly

   upvoted 2 times

 An01234 1 year, 3 months ago

on exam

   upvoted 1 times

ET Answer:

## Answer Area

### Information

Employees

### Option

Subgrid
Composite column
Section
Event

Address

New column
Existing column
Composite column
Section

Email

Category
Monitoring
Track progress

## Question 62

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

Type

#### Configuration

	▼
Virtual entity	
Custom activity	
Custom entity	

Ownership

	▼
Organization	
User or team	

Answer:

## Answer Area

### Entity requirement

Type

	▼
Virtual entity	
Custom activity	
Custom entity	

### Ownership

	▼
Organization	
User or team	

<https://www.loganconsulting.com/blog/create-custom-activity-entities-in-dynamics-365-for-sales/>

<https://docs.microsoft.com/en-us/dynamics365/customerengagement/on-premises/customize/types-of-entities?view=op-9-1>

✉  **estrelle2008**  1 year, 3 months ago

As you need to configure the entity for the online interactions, I guess the answer should be Custom Entity.

You also need to define the new entity as an activity entity, to be able to log it in the contacts timeline, but that is not the question.

   upvoted 7 times

✉  **JudT** 1 week ago

If you agree that the ownership is User or team then the Type can only be a Custom activity.

"Activity entities can only be owned by a user or team, they can't be owned by an organization".

   upvoted 1 times

✉  **utk22**  10 months, 3 weeks ago

correct

   upvoted 1 times

✉  **MARIANA123** 11 months, 1 week ago

Correct

   upvoted 1 times

✉  **Kratinhos** 1 year, 3 months ago

On exam 27/4/22. Passed. I selected same answers

   upvoted 2 times

## Question 63

You need to display activities by using the calendar view.

What should you do?

- A. Create a custom view
- B. Add the calendar control
- C. Edit filters in the view setting
- D. Add the Kanban control

Answer: B

<https://crmtipoftheday.com/1206/view-any-dynamics-365-record-on-a-calendar/>

✉  **df14ce0** 5 months, 1 week ago

correct

   upvoted 1 times

✉  **EgycrmDev** 1 year, 1 month ago

Correct

   upvoted 2 times

## Question 64

DRAG DROP -

A company is implementing Power BI templates for Dynamics 365 Sales.

The company wants to use prebuilt dashboards.

You need to identify the steps to configure the Power BI templates.

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

Actions	Answer area
Create a Power BI user and assign the user system admin rights.	
Configure the refresh frequency for the Power BI dataset.	
Install the Power BI template application.	 
Publish the application within your organization.	
Connect your Dynamics 365 Sales organization to the Power BI template app.	
Create a custom dashboard in Dynamics 365 Sales and add the Power BI Dashboard.	
Install the Power BI Desktop app.	

Answer:

Answer area
Install the Power BI template application.
Connect your Dynamics 365 Sales organization to the Power BI template app.
Configure the refresh frequency for the Power BI dataset.
Publish the application within your organization.

<https://learn.microsoft.com/en-us/dynamics365/sales/configure-sales-template-apps>

✉️  **Newb007** 1 week ago

I'll with with correct as well but you the the prerequisite steps before you can start and another step to implement the dashboard.... that being said the questions is to configure the template and nothing else... so answer is good... sort of frustrating how MS tricks you with wording vs actual knowledge. anyways here is the best link ...

<https://learn.microsoft.com/en-us/dynamics365/sales/configure-sales-template-apps>

   upvoted 1 times

✉️  **[Removed]** 2 months, 3 weeks ago

I will go for the same answer as provided.

   upvoted 1 times

## Question 65

DRAG DROP -

A customer plans to implement Dynamics 365 Sales Insights sales accelerator.

You need to determine which technology to use.

Which technologies should you use? To answer, drag the appropriate technologies to the correct scenarios. Each technology 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.

Technologies	Answer Area	Technology
Timelines	Scenario	
Playbooks	Create automated tasks for quotes.	
Sequences	Allow emails to be automatically generated.	
	Allow wait times before generating the activity.	

ET User: 争议

Playbooks

Sequences

Timelines / Sequences

<https://learn.microsoft.com/en-us/training/modules/manage-relationships-social-selling-dynamics-365-sales/sales-accelerator>

<https://learn.microsoft.com/en-us/training/modules/manage-relationships-social-selling-dynamics-365-sales/2-enforce-best-practices-with-playbooks>

✉  **Newb007** 1 week ago

<https://learn.microsoft.com/en-us/training/modules/manage-relationships-social-selling-dynamics-365-sales/sales-accelerator> Guys its Playbook, Timelines, Sequences im sure on sequences. 80% on timelines and playbooks

   upvoted 1 times

✉  **Newb007** 1 week ago

NVM i think its Playbooks, sequences and sequence here is another link  
<https://learn.microsoft.com/en-us/training/modules/manage-relationships-social-selling-dynamics-365-sales/2-enforce-best-practices-with-playbooks> DOES SALES ACCELERATOR INCLUDE PLAYBOOKS? if not it may all be sequence.... this question is frustrating

   upvoted 1 times

✉  **Zarima** 1 month, 1 week ago

How can be the second one Playbooks? As I understood, emails cannot be included in playbooks templates? Only appointment, tasks and calls. Or did I understand the question wrong?

   upvoted 1 times

✉️  **GuptaAnand** 1 month, 3 weeks ago

Playbooks, Playbooks, Sequence

   upvoted 1 times

✉️  **digitalyash86** 1 month, 4 weeks ago

for all three, answer should be playbooks only

   upvoted 1 times

✉️  **[Removed]** 2 months, 3 weeks ago

Also think Playbook, then Sequence, then Timelines

   upvoted 1 times

✉️  **AhmedGad** 3 months, 3 weeks ago

I think It should be :

Playbooks

Sequences

Timelines

   upvoted 4 times

✉️  **niyazuki** 1 month, 3 weeks ago

ChatGPT has confirmed your answer.

   upvoted 1 times

ET Answer:

### Answer Area

#### Scenario

Create automated tasks for quotes.

Allow emails to be automatically generated.

Allow wait times before generating the activity.

#### Technology

Sequences

Playbooks

Timelines

## Question 66

DRAG DROP -

A company uses Dynamics 365 Sales. You are configuring Power BI dashboards for the company.

You need to configure the dashboards while minimizing required customizations.

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

NOTE: Each correct selection is worth one point.

Tools	Answer Area	Tool
Power BI template app	<b>Dashboard</b> Track business process performance.	
Customized Power BI dashboard	Monitor the pipeline and the pipeline performance.	
	Monitor the frequency of product purchases.	

Answer:

Answer Area	Tool
<b>Dashboard</b> Track business process performance.	Power BI template app
Monitor the pipeline and the pipeline performance.	Power BI template app
Monitor the frequency of product purchases.	Customized Power BI dashboard

<https://learn.microsoft.com/en-us/dynamics365/sales/introduction-sales-template-apps>

✉️ [Removed] 2 months, 3 weeks ago

Correct answer

👍 ↪️ 📈 upvoted 2 times

✉️ df14ce0 5 months, 1 week ago

correct

<https://learn.microsoft.com/en-us/dynamics365/sales/introduction-sales-template-apps>

👍 ↪️ 📈 upvoted 4 times

## Question 67

A company's human resources director wants a solution that improves consistently for the process of onboarding new staff. The company wants to use playbooks for the solution.

You need to create a playbook template to track the staff onboarding.

In which entity must you create records for staff members?

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

ET User:

**B (67%)** **C (33%)**

<https://learn.microsoft.com/en-us/dynamics365/customerengagement/on-premises/developer/resource-entities?view=op-9-1>

✉️  **digitalyash86** 1 month, 4 weeks ago

1. You can not create playbook template for user entity
2. its about onboarding process of employees, all employees does not necessarily to be created as user (which requires certain D365 license for the user to even appear as a user in D365), So employees has to be managed using contact or custom entity.

You can not add playbooks for a custom entity too, so "Contact" only is the answer.

   upvoted 1 times

✉️  **[Removed]** 2 months, 3 weeks ago

Staff will still be a Contact record. Correct

   upvoted 1 times

✉️  **McLOvin** 3 months, 1 week ago

**Selected Answer: B**

I was thinking user as well but it kind of a trick question no? Since you can't create playbooks on the user entity.

The playbook capability is currently enabled only on Lead, Quote, Opportunity, Order, Invoice, Account, and Contact record types. As a playbook manager, when you create a playbook template, you can select which entity that playbook applies to.

So I think B is correct.

   upvoted 2 times

✉️  **AhmedGad** 3 months, 3 weeks ago

**Selected Answer: C**

This entity is used to store information about users in an organization, such as employees and contractors

   upvoted 1 times

✉️  **aleksandratrpeska** 5 months ago

I would say User?

   upvoted 2 times

✉️  **GniaGnia** 5 months ago

Playbooks can not be applied to resource entity. Contact is the solution

   upvoted 2 times

✉️  **Net\_IT** 5 months ago

Shouldn't this be the Resource entity?

<https://learn.microsoft.com/en-us/dynamics365/customerengagement/on-premises/developer/resource-entities?view=op-9-1>

   upvoted 1 times

✉️  **digitalyash86** 1 month, 4 weeks ago

Bookable resource entity is only available with Field Service or Project Operations. Not available with Sales, also BR is only for resources needs time booking ETC i.e. FS engineers etc. Using it for all employees might not make sense,

   upvoted 1 times

ET Answer: B

Bing:

The correct answer is **B. Contact**. In Microsoft Dynamics 365, you can create records for staff members in the **Contact** entity. This entity is used to store information about people, such as employees, customers, and vendors. You can use this entity to track the onboarding process of new staff members by creating a custom field to store the status of their onboarding and using workflows or business process flows to automate the process. You can also use the **Contact** entity to store information about the staff member's role, department, and manager, as well as any other relevant information that you want to track during the onboarding process.

## Question 68

DRAG DROP -

A company uses Dynamics 365 Sales.

Users encounter the following issues when they try to use some views:

- The search results view does not display the expected columns.
- The view for a related table does not have the required columns.

You need to alter the views for each issue.

Which views should you update? To answer, drag the appropriate views to the correct issues. 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.

### Answer Area

Views	Issue	View
Lookup		
Quick Find	Search results view does not display the expected columns.	
Associated	View for a related table does not display required columns.	
Advanced Find		

ET User:

Quick Find

Associated

 **Jacks83** Highly Voted 5 months ago

Quick Find

Associated

Question did not say Advanced Find search, just search

   upvoted 5 times

 **niyazuki** 1 month, 3 weeks ago

Could you elaborate or give provide a source for your reasoning?

   upvoted 1 times

 **[Removed]** Most Recent 2 months, 3 weeks ago

Also going with:

Quick Find

Associated

   upvoted 2 times

ET Answer:

## Answer Area

Issue	View
-------	------

Search results view does not display the expected columns.	<a href="#">Advanced Find</a>
--	-------------------------------

View for a related table does not display required columns.	<a href="#">Associated</a>
---	----------------------------

## Question 69

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.

### Actions

### Answer Area

Select **Sales Insights settings**.

1

Navigate to the App Settings area.

2

Select **Sales Territories** and create a new territory.

3

Add the manager.

4

Add members to the territory.

5

Add connections

5

Select **Related**.



Answer:

## Answer Area

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

 df14ce0  5 months, 1 week ago  
correct  
   upvoted 6 times

## Question 70

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

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

You need to configure the form.

What should you do?

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

ET User: B/D/A

<https://learn.microsoft.com/en-us/power-apps/developer/component-framework/implementing-controls-using-typescript?tabs=before>

✉️  **Newb007** 1 week ago

its B even tho they said no CUSTOM dev... this doesn't qualify as custom in MS eyes... even tho as soon as I see code I call it custom dev.. very misleading. its b tho  
<https://learn.microsoft.com/en-us/power-apps/developer/component-framework/implementing-controls-using-typescript?tabs=before>

   upvoted 1 times

✉️  **sky** 3 months, 3 weeks ago

B is the answer.

   upvoted 2 times

✉️  **Net\_IT** 5 months ago

There is an out of the box PCF control for sliders if I'm not mistaken. So B.

   upvoted 4 times

✉️  **BladeSteel** 5 months, 1 week ago

This should ne D, no?

   upvoted 1 times

✉️  **[Removed]** 2 months, 3 weeks ago

They want to avoid custom development...so PowerBI embedded will work. B

   upvoted 1 times

✉️  **[Removed]** 2 months, 3 weeks ago

Apologies I mean A

   upvoted 1 times

ET Answer: A

Bing:

The correct answer is **B. Add a Power Apps component framework (PCF) control to the form.** In Dynamics 365 Sales, you can use custom controls to transform fields that traditionally contain text into visualizations [1](#). You can use a custom control to add visualizations to a field [1](#). For example, you could use a number input custom control for a field in web browser clients and a slider custom control for the phone app [1](#). After the customization is published, users can fully interact with the control to change the value, such as by sliding the control when using the linear slider custom control [1](#). Changes are automatically saved when the form is closed just as they are when the user changes a traditional field on a form [1](#).

## Question 71

A sales representative at a company uses Dynamics 365 Sales. 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. system dashboard
- B. personal view, and share it with the other representatives
- C. system view
- D. report that is sent to the team once a day

ET User: 有可能是 B

**C (82%)**      **B (18%)**

✉ [Removed] Highly Voted 5 months, 1 week ago  
Selected Answer: C  
I'd go for System View.  
👍 ↵ 🏴 upvoted 9 times

✉ Zmajica 3 months ago  
how can you config.system view with sales reps.role? you need to be system admin  
👍 ↵ 🏴 upvoted 1 times

✉ MP270915 2 months, 2 weeks ago  
It never says that is the representative who needs to do the job of setting this up, it just says their requirements. Instead, it says "YOU need to setup the system", and you are not the representative... I would assume "you" are the system customiser.  
👍 ↵ 🏴 upvoted 1 times

✉ Newb007 Most Recent 1 week ago  
"Other sales representatives must be able to display the same information and format when necessary." says other sales reps not the entire ORG.... think about it.. would giving the whole org access to this data make sense? its B  
👍 ↵ 🏴 upvoted 1 times

✉ Ghalandor90 2 weeks, 6 days ago  
Selected Answer: B  
B is the answer  
👍 ↵ 🏴 upvoted 2 times

✉ [Removed] 2 months, 3 weeks ago  
Personal view and share  
👍 ↵ 🏴 upvoted 4 times

ET Answer: B

Bing:

The correct answer is **B. personal view, and share it with the other representatives**. In Dynamics 365 Sales, a sales representative with the Salesperson security role can create a personal view to display only the information they need, such as full name, address, phone number, and opportunity amount. A personal view is a saved query that displays a filtered list of records based on specific criteria. The sales representative can then share this personal view with other sales representatives so that they can also display the same information and format when necessary. This allows the sales team to quickly access the information they need without having to create their own views or rely on system views or reports.

## Question 72

HOTSPOT -

You implemented Dynamics 365 Sales for a company.

Users experience the following issues:

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

You need to resolve the issues.

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

NOTE: Each correct selection is worth one point.

### Answer Area

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

ET User:

- Add users to field-level security
- Add the view to the site map

  **Newb007** 1 week ago

why site map?

   upvoted 1 times

  **Pirozhok** 4 months ago

In my opinion, it is

- Add users to field-level security
- Add the view to the site map

   upvoted 4 times

  **Jacks83** 5 months ago

Add users to field level security  
Add view to site map (app)?

   upvoted 4 times

ET Answer:

## Answer Area

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

## Question 73

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 front-line worker.

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

	<b>Accounts table</b>	<b>Contacts table</b>	<b>Leads table</b>	<b>Opportunities table</b>	<b>Custom tables</b>
<b>Manager role</b>	Read and update	Read and update	Read	Read	Read
<b>Administrator role</b>	Create, read, and update				
<b>Front-line worker role</b>	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.

Licenses	Answer Area	
	Role	License
Team Members	Managers	License
Dynamics 365 Sales Premium	Administrators	License
Dynamics 365 Sales Enterprise	Front-line workers	License
Dynamics 365 Sales Professional		

ET User:

- Professional (Team member can't update Accounts)
- Professional (Team member can't update or create Accounts)
- Team Member

<https://go.microsoft.com/fwlink/?LinkId=866544>

<https://learn.microsoft.com/en-us/dynamics365/sales/sales-team-member>

  **MARIO2011** 23 hours, 12 minutes ago

On exam 19/08/23,I passed.

   upvoted 1 times

  **Asadipour** 1 month ago

Team Member does not have access to Account Table. So the answer is :

Professional

Professional

Team Member

<https://go.microsoft.com/fwlink/?LinkId=866544> (Page 26)

   upvoted 1 times

✉️  **Antea** 1 month, 4 weeks ago

I'd select:

- Professional (Team member can't update Accounts)
- Professional (Team member can't update or create Accounts)
- Team Member

   upvoted 1 times

✉️  **1d7136c** 2 months ago

Managers: Team Members

Administrators and Front-line workers: Dynamics 365 Sales Enterprise

   upvoted 1 times

✉️  **Radoslavov** 3 months ago

I think is Team Members, Sales Professional and Teams Members as Team Members license allows the user to do some basic actions such as: Create, read, update, and delete contacts, activities, and notes.

   upvoted 1 times

✉️  **Radoslavov** 3 months ago

You can read more on this official MS link: <https://learn.microsoft.com/en-us/dynamics365/sales/sales-team-member>

   upvoted 1 times

ET Answer:

### Answer Area

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

## Question 74

HOTSPOT -

You implement Dynamics 365 Sales for a company in New York that sells gym equipment.

The company has two types of salespeople: inside sales and outside sales.

The inside salespeople must enter the following data in leads:

- First and last name
- Phone number
- Full address

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

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

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

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

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

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

NOTE: Each correct selection is worth one point.

### Answer Area

#### Requirement

Inside salespeople must enter data.

#### Action

a form with business rules
a Power Automate Desktop flow
two views

Customers outside New York must be displayed for outside salespeople.

views
forms
site maps
business process flows

Answer:

## Answer Area

### Requirement

Inside salespeople must enter data.

### Action

a form with business rules
a Power Automate Desktop flow
two views

Customers outside New York must be displayed for outside salespeople.

views
forms
site maps
business process flows

✉️  **MP270915** 2 months, 2 weeks ago

Correct... I wonder how the other options could even be possible

   upvoted 1 times

✉️  **Radoslavov** 3 months ago

Correct!

   upvoted 1 times

## Question 75

You modify the default form for salespeople in Dynamics 365 Sales. A US Citizen column has a type option of Yes or No.

The salespeople require a country/region column to appear only if the US Citizen column is set to No.

You need to enable the column to appear when the condition is met.

What should you configure?

- A. business process flow
- B. column with type as Choices
- C. column with type as Calculated
- D. business rule

Answer: D

  niyazuki 1 month, 3 weeks ago

I hope everybody gets this question right.

   upvoted 1 times

  Radoslavov 3 months ago

**Selected Answer: D**

correct!

   upvoted 2 times

Bing:

The correct answer is **D. business rule**. In Dynamics 365 Sales, you can use a business rule to show or hide a field based on the value of another field <sup>1</sup>. In this case, you can create a business rule that shows the country/region column only if the US Citizen column is set to No <sup>1</sup>. Business rules allow you to apply form logic without writing JavaScript or creating plug-ins <sup>1</sup>. You can use business rules to set field values, clear field values, set field requirement levels, show or hide fields, enable or disable fields, validate data and show error messages, and create business recommendations based on business intelligence <sup>1</sup>.

## Question 76

A company uses Dynamics 365 Sales with Microsoft Exchange and server-side synchronization.

All users have approved mailboxes. Some users report that emails will not send.

You need to resolve the issue.

What should you do?

- A. Disable impersonation mode.
- B. Add the email address to the email profile.
- C. Turn on automatic tracking.
- D. Test and enable the mailboxes.

ET User: D

<https://learn.microsoft.com/en-us/dynamics365/sales/configure-email?tabs=SP>

✉️  **LinhPA** Highly Voted  4 months, 1 week ago

**Selected Answer: D**

<https://learn.microsoft.com/en-us/dynamics365/sales/configure-email?tabs=SP>

   upvoted 8 times

✉️  **Sickkgb** 2 months ago

Correct.

The mailboxes will be in the Not Run state initially. Select Approve and Test mailboxes to test the mailboxes and approve them.

   upvoted 1 times

✉️  **Sickkgb** Most Recent  2 months ago

**Selected Answer: D**

The mailboxes will be in the Not Run state initially. Select Approve and Test mailboxes to test the mailboxes and approve them.

   upvoted 1 times

✉️  **[Removed]** 2 months, 3 weeks ago

**Selected Answer: D**

After approval given to Mailbox it must be tested and enabled for it to work

   upvoted 1 times

✉️  **Radoslavov** 3 months ago

**Selected Answer: D**

Approving, without Test and Enable will not do anything. Test and ENable will apply to setting for Incoming/Outgoing and TAC

   upvoted 2 times

✉️  **McLOvin** 3 months, 1 week ago

**Selected Answer: D**

Should be D. Just did this last week for a customer.

   upvoted 2 times

ET Answer: A

Bing:

The correct answer is D. **Test and enable the mailboxes**. If some users are reporting that emails will not send, you should test and enable their mailboxes to resolve the issue. In Dynamics 365 Sales, you can use the Test and Enable Mailboxes feature to verify that server-side synchronization is set up correctly and that email is flowing properly between Dynamics 365 Sales and Microsoft Exchange <sup>1</sup>. This feature tests the connectivity, credentials, and email configuration of each mailbox, and provides detailed information about any issues that it finds <sup>1</sup>. Once you have resolved any issues, you can enable the mailboxes to start sending and receiving email <sup>1</sup>.

## Question 77

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.

NOTE: Each correct selection is worth one point.

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

Answer:

### Answer Area

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

✉️👤 niyazuki 1 month, 3 weeks ago

ChatGPT says it's Research Activity, Connect Sequence, Adaptive Sequence

👍👎FLAG upvoted 1 times

✉️👤 [Removed] 2 months, 3 weeks ago

Correct answer

👍👎FLAG upvoted 2 times

Bing:

To set up a meeting and notify the manager if a quote is sent for over a million dollars using Dynamics 365 Sales Premium with LinkedIn Sales Navigator, you should use **Adaptive sequence**. Adaptive sequences are a type of sequence that can be used to automate sales activities based on specific conditions or triggers <sup>1</sup>. You can use adaptive sequences to create a set of actions that will automatically generate a meeting and notify the manager when a quote is sent for over a million dollars. So, the correct answer is **Adaptive sequence**. Is there anything else you would like to know? 😊

## Question 78

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.

### Answer Area

Configuration	Option
Authentication method	<div style="border: 1px solid #ccc; padding: 5px; width: fit-content;">Implicit OAuth2 Key</div>
Privacy level	<div style="border: 1px solid #ccc; padding: 5px; width: fit-content;">Public Organizational Private</div>

Answer:

### Answer Area

Configuration	Option
Authentication method	<div style="border: 1px solid #ccc; padding: 5px; width: fit-content;">Implicit <b>OAuth2</b> Key</div>
Privacy level	<div style="border: 1px solid #ccc; padding: 5px; width: fit-content;">Public <b>Organizational</b> Private</div>

  [Removed] 2 months, 3 weeks ago

Correct...just did the exercise yesterday. OAuth2 and Organization level

   upvoted 2 times

## Question 79

A quote is accepted by a customer. A salesperson creates an order from the quote. The customer contacts the salesperson to request a repeat of the same order.

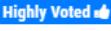
The salesperson wants to create another order from the same quote.

You need to create the order.

What should you do?

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

ET User: C

✉️  **AhmedGad**  3 months, 3 weeks ago

**Selected Answer: C**

If the quote is in a "Won" status, the salesperson can create a new order from the quote without revising it. This is because when a quote is "Won", it is locked and cannot be modified, but it can still be used to create orders. (C option)

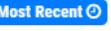
However, if the quote is in a "Closed" status (other than "Won"), the salesperson would need to revise the quote before creating a new order from it. (B option)

   upvoted 6 times

✉️  **Pirozhok**  4 months ago

I would go for C. I tried it in my environment. One can create one more order from Won status of Quote.

   upvoted 6 times

✉️  **Asadipour**  2 months, 3 weeks ago

**Selected Answer: C**

The answer is C.

   upvoted 2 times

✉️  **Asadipour** 2 months, 3 weeks ago

The answer is C.

   upvoted 2 times

ET Answer: D

Bing:

The correct answer is C. **Create the order from the quote because it is in a Won status.** Once a quote is accepted by a customer, it is typically in a "Won" status, indicating that the salesperson has won the business. From this status, the salesperson can create an order from the quote to fulfill the customer's request. This process can be repeated if the customer requests another order based on the same quote. The other options are not correct because they involve revising the quote or creating an order from a quote in a different status. Is there anything else you would like to know? 😊

## Question 80

A company uses Dynamics 365 Sales.

A user cannot find the option to view activities in the Kanban view or rearrange the activities.

You need to make the Kanban view available to the user.

What should you do?

- A. Add the user to the correct security role.
- B. Create a new system view.
- C. Add the control to the Activity table.
- D. Instruct the user to create a personal view.

ET User: C

**C (60%)**      **A (40%)**

<https://learn.microsoft.com/en-us/dynamics365/sales/activity-kanban-view#open-a-kanban-view>

✉  **Asadipour** 4 weeks ago

**Selected Answer: C**

If the Kanban control is added to the entity, it is available for any primary sales role, like sales manager, sales person, etc.

   upvoted 1 times

✉  **[Removed]** 2 months, 3 weeks ago

**Selected Answer: C**

Control needs to be added to the Activity entity

   upvoted 3 times

✉  **inka11** 2 months, 3 weeks ago

**Selected Answer: C**

A Kanban view is available when the Kanban control is added to the Activity entity. If you don't see the Kanban view, check with your system customizer.

   upvoted 2 times

 **AhmedGad** 3 months, 3 weeks ago

**Selected Answer: A**

The correct answer is A. Add the user to the correct security role. By adding the user to the appropriate security role, the user will have access to the system view that includes the Kanban view for activities.

Creating a new system view or adding a control to the Activity table would not necessarily make the Kanban view available to the user. Instructing the user to create a personal view may not be a viable solution if the user needs access to the standard Kanban view for activities.

   upvoted 4 times

 **skyy** 3 months, 3 weeks ago

I would say C. In the learn document it specifies that Kaban is available for any primary sales role. We can assume that in the sales environment user will be a Sales person or Sales Manager role, therefore the control for the Activity is not activated.

   upvoted 1 times

 **Pirozhok** 4 months ago

I think the right answer is C.

<https://learn.microsoft.com/en-us/dynamics365/sales/activity-kanban-view#open-a-kanban-view>

   upvoted 2 times

ET Answer: A

Bing:

The correct answer is **C. Add the control to the Activity table**. A Kanban view is available when the Kanban control is added to the Activity entity. If the user doesn't see the Kanban view, they should check with their system customizer  . The other options are not correct because they do not involve adding the Kanban control to the Activity entity, which is necessary for the user to be able to view activities in the Kanban view and rearrange them. Is there anything else you would like to know? 😊

## Question 81

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 cost-effective manner.

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

NOTE: Each correct selection is worth one point.

Sales plans	Answer Area	Sales plan
Feature		
Dynamics 365 Sales Premium	Knowledge management	Sales plan
Dynamics 365 Sales Enterprise	Sequence designer	Sales plan
Dynamics 365 Sales Professional	Predictive forecasting	Sales plan

Answer: 争议挺大

Answer Area	
Feature	Sales plan
Knowledge management	Dynamics 365 Sales Enterprise
Sequence designer	Dynamics 365 Sales Premium
Predictive forecasting	Dynamics 365 Sales Premium

<https://dynamics.microsoft.com/en-us/sales/pricing/>

<https://learn.microsoft.com/en-us/dynamics365/sales/configure-premium-forecasting>

<https://learn.microsoft.com/en-us/dynamics365/sales/create-and-activate-a-sequence>

  sanyog7 1 week, 1 day ago

Dynamics 365 Sales Enterprise Plan: This plan includes Sequence Manager capabilities and provides a robust platform for sales management.

Dynamics 365 Sales Insights Add-On: This add-on will give you access to Predictive Forecasting capabilities and advanced sales analytics.

For Knowledge Management, you may need to consider how to integrate or utilize other Microsoft products to meet this requirement.

   upvoted 1 times

✉️  **1d7136c** 2 months ago

Correct.

"You need to recommend sales plans that provide the full feature capabilities in the most cost-effective manner".

Predictive forecasting and sequence designer are limited with Sales Enterprise plan.  
<https://dynamics.microsoft.com/en-us/sales/pricing/>

   upvoted 3 times

✉️  **niyazuki** 1 month, 3 weeks ago

Amazing source, thank you.

   upvoted 1 times

✉️  **Zmajica** 3 months ago

Enterprise

Enterprise

Premium - <https://learn.microsoft.com/en-us/dynamics365/sales/configure-premium-forecasting>

   upvoted 1 times

✉️  **AhmedGad** 3 months, 3 weeks ago

Not Correct, the 3 should be Dynamics 365 Sales Enterprise plan.

Regarding this link: <https://dynamics.microsoft.com/en-us/sales/pricing/> I found that knowledge management is included but Sequence designer and Predictive forecasting are limited. as the question asked for the most cost-effective manner then Dynamics 365 Sales Enterprise plan I think it would be fine

   upvoted 1 times

✉️  **Pirozhok** 4 months ago

Here <https://learn.microsoft.com/en-us/dynamics365/sales/create-and-activate-a-sequence> it says that Enterprise is okay for Sequence Designer as well as Premium

   upvoted 2 times

Bing:

For the sales manager's requirement of having the knowledge management feature, I would recommend the **Dynamics 365 Sales Enterprise** plan. This plan includes the knowledge management feature and provides industry-leading sales force automation with contextual insights and advanced customization capabilities [1](#). The Dynamics 365 Sales Professional plan does not include the knowledge management feature, while the Dynamics 365 Sales Premium plan includes additional features that may not be necessary for the sales manager's requirements. Is there anything else you would like to know? 😊

For the sales manager's requirement of having the sequence designer feature, I would recommend the **Dynamics 365 Sales Enterprise** or **Dynamics 365 Sales Premium** plan. The sequence designer is a feature of the sales accelerator, which is available in both the Dynamics 365 Sales Enterprise and Dynamics 365 Sales Premium plans [1](#) [2](#). The Dynamics 365 Sales Professional plan does not include the sales accelerator feature, so it would not be suitable for the sales manager's requirements. Is there anything else you would like to know? 😊

For the sales manager's requirement of having the predictive forecasting feature, I would recommend the **Dynamics 365 Sales Premium** plan. This plan includes the predictive forecasting feature, which uses AI-driven models to provide forecast projections based on data, helping sellers and managers improve their forecast accuracy [1](#). The Dynamics 365 Sales Enterprise and Dynamics 365 Sales Professional plans do not include the predictive forecasting feature, so they would not be suitable for the sales manager's requirements. Is there anything else you would like to know? 😊

## Question 82

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.

Answer: D

<https://carldesouza.com/how-to-change-the-number-of-records-per-page-displayed-in-dynamics-365/>

✉️ Vin22CRM 1 month, 3 weeks ago

Selected Answer: D

Finally an easy one

Like Share Flag upvoted 1 times

✉️ [Removed] 2 months, 3 weeks ago

Correct

Can set how many records you want to view on a page

D. Update personalization settings.

Like Share Flag upvoted 1 times

✉️ inka11 2 months, 3 weeks ago

Selected Answer: D

<https://carldesouza.com/how-to-change-the-number-of-records-per-page-displayed-in-dynamics-365/>

Like Share Flag upvoted 1 times

✉️ Radoslavov 3 months ago

Selected Answer: D

Correct

Like Share Flag upvoted 1 times

✉️ AhmedGad 3 months, 3 weeks ago

Selected Answer: D

Correct

Like Share Flag upvoted 1 times

## Question 83

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.

ET User: B/D, 理论上 BD 都可以, 这道题问的不严谨, 我推荐 D, 维护起来简单

✉️ 🚩 **Newb007** 1 week ago

D. Use security roles. (im fresh off of PL600 and PL200) security roles can limit what you see in views i dunno what people are talking about on here

To limit users to only individual department forms and views, you should use security roles. Security roles in a CRM or similar system allow you to control what records and features users can access based on their assigned role. This is a common practice for segregating access within an organization and ensuring that users only have access to the information and functionalities relevant to their responsibilities.

The other options, while relevant to managing user access and customization, might not directly address the need to restrict users to specific department forms and views

👍 🔍 ⚡ upvoted 1 times

✉️ 🚩 **sanyog7** 1 week, 1 day ago

You can achieve the goal of limiting users to individual department forms and views by creating separate model-driven apps for each department in Dynamics 365 Sales. Model-driven apps allow you to tailor the user experience by presenting specific forms, views, and functionalities to different user groups.

👍 🔍 ⚡ upvoted 1 times

✉️ 🚩 **Asadipour** 1 month, 3 weeks ago

**Selected Answer: B**

It can be done by SecurityRoles, but the question says :  
"The company wants to improve usability for its users."  
So, B would be a better choice.

👍 🔍 ⚡ upvoted 2 times

□  **Candido** 2 months, 2 weeks ago

Chat GPT answer:

To limit users to only individual department forms and views, you can follow these steps:

Identify the user roles: Determine the different roles or access levels that exist within the company. For example, you may have roles like "Department A User," "Department B User," and "Administrator."

So D looks indeed correct

   upvoted 1 times

□  **digitalyash86** 1 month, 4 weeks ago

This can only work for forms but There is no standard option to control visibility of view based on security roles. So best is to create separate MDAs, add department specific forms and views to them and control access on MDAs based on the security roles.

   upvoted 1 times

□  **businesselements1** 2 months, 3 weeks ago

Why not only create 2 sitemap instead of create 2 MDA ?

   upvoted 1 times

□  **digitalyash86** 1 month, 4 weeks ago

Bcoz sitemaps can not be hidden /shown based on security roles.

   upvoted 1 times

□  **businesselements1** 2 months, 3 weeks ago

MDA is the answer because you can only create 1 Sitemap per app

   upvoted 2 times

□  **[Removed]** 2 months, 3 weeks ago

**Selected Answer: B**

Model driven app to limit the forms and views to display for each department

   upvoted 2 times

□  **Kunterbunt** 4 months ago

**Selected Answer: B**

Since Views are not restricted by roles you need separate apps.

If it was only forms, D would work.

   upvoted 4 times

□  **Newb007** 1 week ago

VIEWS arent restricted but certain data (tables/views/forms) is therefore the views are

   upvoted 1 times

□  **McLOvin** 3 months, 1 week ago

Chat gpt 4:

B. Create a model-driven app for each department.

By creating a model-driven app for each department, you can customize the app to display only the specific forms and views designed for that department. You can then grant users access to the appropriate app for their department, ensuring that they only see the forms and views relevant to their work.

   upvoted 1 times

 **Newb007** 1 week ago

also chat GPT 4. D. Use security roles.

To limit users to only individual department forms and views, you should use security roles. Security roles in a CRM or similar system allow you to control what records and features users can access based on their assigned role. This is a common practice for segregating access within an organization and ensuring that users only have access to the information and functionalities relevant to their responsibilities.

The other options, while relevant to managing user access and customization, might not directly address the need to restrict users to specific department forms and views

ASK GPT A FEW TIMES IT ALWAYS GIVES YOU DIF ANSWERS DON't TRUST IT WITH  
MS WORDING OF QUESTIONS

   upvoted 1 times

ET Answer: D

Bing: D

To limit users to only individual department forms and views, you should use security roles. Security roles in Dynamics 365 define how different users, such as salespeople, access different types of records. By creating security roles for each department and assigning them to the appropriate users, you can ensure that users only have access to the forms and views that are relevant to their department <sup>1</sup>. So the correct answer is D. Use security roles. Is there anything else you would like to know? 😊

## Question 84

A company deploys Dynamics 365 Sales Enterprise.

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

You need to set up user access.

What should you do?

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

Answer: A, 无评论

Bing:

To set up user access so that users can view account and contact records but not edit or add information to those records, you should purchase a Dynamics 365 Team Members license and assign the license to users. The Dynamics 365 Team Members license provides users with read access to Dynamics 365 Sales Enterprise data, including accounts and contacts, but does not allow them to edit or add information to those records  . So the correct answer is A.  
Purchase a Dynamics 365 Team Members license and assign the license to users. Is there anything else you would like to know? 

## Question 85

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 Premium
- C. Sales Enterprise
- D. Microsoft Relationship Sales

Answer: C

✉️  **MARIO2011** 23 hours, 44 minutes ago

On exam 19/08/23, I passed, different question but same meaning.

   upvoted 1 times

✉️  **niyazuki** 2 weeks, 4 days ago

As of 2021:

Sales Professional: This license typically provides the ability to create up to 15 custom entities.

Sales Premium: This license typically provides the ability to create up to 30 custom entities.

Sales Enterprise: This license typically provides the ability to create up to 300 custom entities.

But since Enterprise is cheaper than Premium, given answer is correct.

   upvoted 2 times

✉️  **Ghalandor90** 2 weeks, 6 days ago

**Selected Answer: C**

Correct

   upvoted 1 times

Bing: C

If the company requires 20 custom tables and wants the most cost-effective solution, I would recommend the Dynamics 365 **Sales Enterprise license**. The Sales Enterprise license provides users with access to all the core sales capabilities of Dynamics 365 Sales, including the ability to create custom tables <sup>1</sup>. Is there anything else you would like to know? 😊

## Question 86

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.

### Answer Area

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

Answer:

### Answer Area

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

 **sanyog7** 1 week ago

Correct

Assistants - Adding and Removing Columns from Personal Views  
Supervisors - Modifying Columns and Sharing Views

   upvoted 1 times

## Question 87

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.

Actions	Answer Area
Add tasks to the sequence.	
Connect the existing segment to the sequence.	
Create a sequence.	
Activate the sequence.	

Answer: 无评论

### Answer Area

Create a sequence.

Add tasks to the sequence.

Activate the sequence.

Connect the existing segment to the sequence.

Bing:

To create tasks and assign them to lead records using the same criteria as the assignment rules, you should perform the following actions in this order:

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

This will allow you to automatically add a series of tasks to the lead records using the same criteria as the assignment rules. Is there anything else you would like to know? 😊

## Question 88

DRAG DROP -

You are a salesperson for a company.

A customer asks you to place an order based on a draft quote you have provided.

You need to create the order.

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

Actions	Answer Area
Select the applicable quote.	
Select <b>Activate Quote</b> .	
Enter the date in the Data Won field and add a description.	
Enter the price list and currency information.	➤
Select <b>Create Order</b> .	➤
Enter the shipping and payment information.	➤
Select <b>Publish</b> .	➤

Answer: 无评论

### Answer Area

Select the applicable quote.
Select <b>Activate Quote</b> .
Select <b>Create Order</b> .
Enter the date in the Data Won field and add a description.

## Question 89

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. CEO – Business Manager
- B. Knowledge Manager
- C. Common Data Service
- D. Delegate

Answer: A, 无评论, 重复题

## Question 90

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.

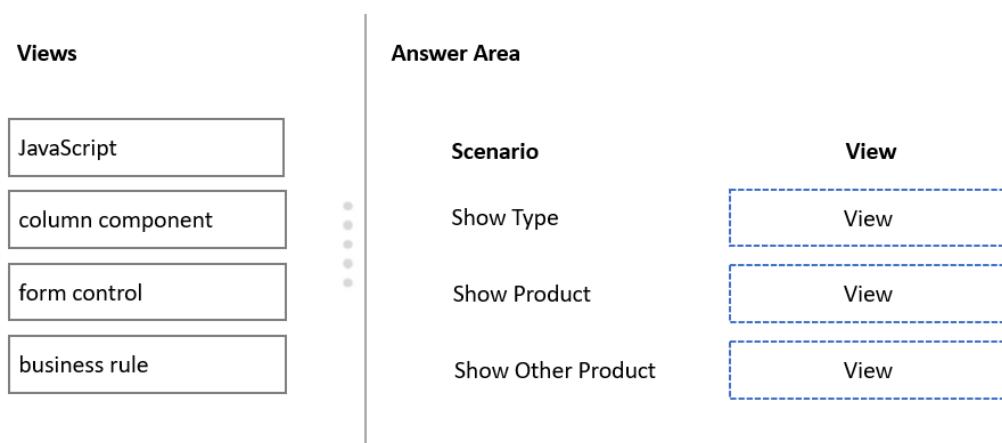
The sales team requires only the following functionality to appear:

- 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.



ET User:

business rule

JavaScript

JavaScript

✉  **Antea** 2 months ago

I'll select: Business Rule - JS - JS.

Multi select option sets are not supported in Business Rules, neither for condition or to update/hide field.

   upvoted 2 times

✉  **Svamsi** 1 month, 3 weeks ago

Sorry my bad, just now tested and it is BR, JS,JS

   upvoted 1 times

✉  **Svamsi** 1 month, 3 weeks ago

But in the list only product is the multiselect option set and only other product column is dependent on that. So BR, BR, JS is possible.

   upvoted 1 times

✉  **digitalyash86** 1 month, 4 weeks ago

Agreed.

   upvoted 1 times

ET Answer:

#### Answer Area

Scenario	View
Show Type	business rule
Show Product	business rule
Show Other Product	JavaScript

## Question 91

You need to ensure that a user named User1 can assign salespeople to sales territories. The solution must use the principle of least privilege.

To which security role should you assign User1?

- A. Common Data Service
- B. CEO – Business Manager
- C. Marketing Professional
- D. Knowledge Manager

Answer: B, 重复题

  **Newb007** 1 week ago

for the 10000000001 time its CEO – Business Manager or Sales manager

   upvoted 1 times

## Question 92

HOTSPOT -

A company uses Dynamics 365 Sales and Dynamics 365 Customer Service. The company plans to automate a series of activities.

You need to configure playbooks to meet the company's requirements.

Which component is used for the configuration? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

### Answer Area

Requirement	Action
Select record types for playbook.	Dynamics 365 Sales tables only Dynamics 365 Sales and Dynamics 365 Customer Service tables only Dynamics 365 Sales, Dynamics 365 Customer Service, and custom tables
Add activities for playbook.	Notes Emails Alerts Phone calls
Display playbook activities in the timeline of a record.	Category Monitoring Track progress

Answer: 无评论

### Answer Area

Requirement	Action
Select record types for playbook.	Dynamics 365 Sales tables only Dynamics 365 Sales and Dynamics 365 Customer Service tables only Dynamics 365 Sales, Dynamics 365 Customer Service, and custom tables
Add activities for playbook.	Notes Emails Alerts Phone calls
Display playbook activities in the timeline of a record.	Category Monitoring Track progress

Bing:

To configure playbooks in Dynamics 365 Sales and Dynamics 365 Customer Service, you can select record types for the playbook from **Dynamics 365 Sales and Dynamics 365 Customer Service tables only**. Currently, the Playbook feature is only available for these two tables . Is there anything else you would like to know? 😊

## Question 93

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

Answer: B

 **Ghalandor90** 2 weeks, 1 day ago

**Selected Answer: B**

answer is b

   upvoted 1 times

 **niyazuki** 2 weeks, 4 days ago

Dynamic marketing lists are lists of records that are dynamically generated based on predefined criteria or rules. They automatically update to include records that match the specified criteria. Therefore, the most suitable option for your requirement is to set up dynamic marketing lists to distribute product information to different regions. So D is the correct answer.

   upvoted 1 times

Bing:

The correct answer is **B. territories**. Sales territories in Dynamics 365 Sales allow organizations to create segments and structures to manage sales strategies and increase revenue <sup>1</sup>. By setting up sales territories, you can improve sales potential and revenues by creating territories for customer and market segments in Dynamics 365 Customer Engagement (on-premises). Then assign appropriate salespeople to handle the sales and revenue opportunities for those territories <sup>2</sup>. This way, the company can send the latest product information to each region every month.

## Question 94

A company uses Dynamics 365 Sales.

The sales manager wants lead 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

Answer: A, 无评论

Bing:

The correct answer is **A. assignment rule**. In Dynamics 365 Sales, assignment rules define how leads are automatically distributed to sellers <sup>1</sup>. When a lead is created and meets certain conditions that are defined in assignment rules, the lead is automatically assigned to the right seller <sup>2</sup>. The automated process saves time and optimizes the workload across your sales team <sup>2</sup>. There are two types of basic algorithms for lead distribution: Round Robin and Load Balancing <sup>2</sup>. In a round-robin-based assignment, the system looks at all the matched sellers of the lead and assigns it to the one who was assigned a lead least recently <sup>2</sup>. This includes lead assignments from other sources, such as manual assignment or via an add-in <sup>2</sup>.

## Question 95

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.

Answer: C

  niyazuki 1 month, 3 weeks ago

Correct

   upvoted 1 times

Bing:

The correct answer is **C. Remove unnecessary columns from the form**. In Dynamics 365 Sales, sellers use forms to interact with the data they need to do their work  . It's important that the forms they use are designed to allow them to find or enter the information they need quickly  . You can use the form designer to customize the forms included with Dynamics 365 Sales to meet your sales organization's specific needs  . By removing unnecessary columns from the form, you can simplify data entry for the sales representatives and make it easier for them to get to the required data entry areas.

## Question 96

A company manually assigns leads to salespeople.

The sales manager requires automated lead assignment rules. An administrator enables the feature. However, you are unable to access the Assignment rules area.

You need to request access from the administrator.

Which security role should you request?

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

Answer: C

<https://learn.microsoft.com/en-us/dynamics365/sales/create-and-activate-assignment-rule>

✉️  **chloaus** 3 weeks, 1 day ago

Sales Manager security role has access to Assignment Rule table at Business Unit level.  
Sequence Manager security role has access to Assignment Rule table at Parent: Child Business Units level.

I would say sequence manager is the better answer in the context of the question.

<https://learn.microsoft.com/en-us/dynamics365/sales/create-and-activate-assignment-rule>

   upvoted 1 times

✉️  **niyazuki** 1 month, 3 weeks ago

To request access to the Assignment rules area, you should request the security role of "Sales Manager." The Sales Manager role typically has the necessary permissions and responsibilities related to lead assignment and managing the sales team. The Sequence Manager role typically involves managing and optimizing sales sequences, which are a series of predefined sales activities or steps. This role may not have direct access to lead assignment rules, so requesting this role may not be relevant in this scenario.

   upvoted 2 times

Bing:

You should request the **Sequence Manager** security role from the administrator. According to Microsoft Learn, the security roles required to manage assignment rules for lead and opportunity routing are **System Administrator**, **Sequence Manager**, or **Sales Manager**<sup>1</sup>. With the Sequence Manager security role, you will be able to create, edit, delete or deactivate assignment rules, manage sales teams and seller attributes<sup>1</sup>.

# Common Question 2

## Question 1

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

You successfully close a sale.

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

NOTE: Each correct selection is worth one point.

- A. Change Est. Revenue to Actual amount
- B. Set the Status reason to Won.
- C. Change Est. Close Date to Actual close date.
- D. Change the Actual Revenue to Actual amount.

ET User: BD

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

✉  **Ross22**  2 years, 2 months ago

B & D is Correct.

To close your opportunity as won, select Close as Won.

In Actual Revenue, Verify the amount, and make changes, if necessary.

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

   upvoted 23 times

✉  **Sneha365**  2 years, 3 months ago

B and D seem to be correct options...

While closing an opportunity, we set the status reason and actual revenue

   upvoted 8 times

✉  **Doppelfinger** 2 years, 3 months ago

Yes, because on the small popup pane B, D is required, and there is also a description field.

   upvoted 3 times

✉  **JudT**  2 months, 1 week ago

BD is correct.

1)

Status Reason : Won

2)

Calculate actual revenue from quotes : NO

THEN: Change the Actual Revenue to Actual amount

   upvoted 1 times

- ✉ [Removed] 2 months, 3 weeks ago  
Definitley B & D  
👍👎FLAG upvoted 1 times
- ✉ inka11 2 months, 3 weeks ago  
**Selected Answer: BD**  
In Actual Revenue, Verify the amount, and make changes, if necessary.  
change status to won  
👍👎FLAG upvoted 1 times
- ✉ [Removed] 5 months, 1 week ago  
**Selected Answer: BD**  
I'd go for B & D.  
👍👎FLAG upvoted 1 times
- ✉ utk22 10 months, 3 weeks ago  
**Selected Answer: BD**  
B&D correct.  
👍👎FLAG upvoted 1 times
- ✉ SashM 1 year, 4 months ago  
**Selected Answer: BD**  
B And D are correct answer.  
👍👎FLAG upvoted 2 times
- ✉ christosp619 1 year, 6 months ago  
**Selected Answer: BD**  
B and D  
👍👎FLAG upvoted 2 times
- ✉ SamuelE 1 year, 9 months ago  
**Selected Answer: BD**  
B and D  
👍👎FLAG upvoted 3 times
- ✉ NanditaTandon 1 year, 9 months ago  
**Selected Answer: BD**  
B and D  
👍👎FLAG upvoted 3 times
- ✉ Mobellezza 2 years ago  
I think I will go with options A, B and C. This is because you have all 3options marked as required on the opportunity close form apart from option D.  
👍👎FLAG upvoted 1 times
- ✉ Mobellezza 2 years ago  
Okay after taking a second look at this question, I believe the Correct answer should be B and D. I'll tell you why. B because you have to set the status reason as won and D because you have to set the Actual revenue which is the actual amount you made from the opportunity (just twist of English). Option A is wrong because you can't actually change Est Revenue to Actual Revenue in the opportunity close form. Option C also wrong because you can't change Est Close date to actual close date on the oppr close form. I don't know if i'm making sense but....  
👍👎FLAG upvoted 4 times
- ✉ klnv000 2 years, 2 months ago  
C is eliminated because logically, Estimated Close Date may not be Actual Close Date.  
👍👎FLAG upvoted 1 times
- ✉ SKpi200 2 years, 3 months ago  
A,B - A should say Est Revenue to 'Actual REVENUE' (as its the Act Rev field that is shown on Opp Close)  
👍👎FLAG upvoted 2 times
- ✉ mosolover 2 years, 3 months ago  
Should be A and C  
👍👎FLAG upvoted 1 times
- ✉ mosolover 2 years, 3 months ago  
Sorry , it is B and D  
👍👎FLAG upvoted 8 times
- ✉ vieira22 2 years, 3 months ago  
Does not make sense.  
👍👎FLAG upvoted 1 times

ET Answer: AD

Bing: BD

After successfully closing a sale in Dynamics 365 Sales, you should perform the following two actions: **B. Set the Status reason to Won** and **D. Change the Actual Revenue to Actual amount**. When you close an opportunity as won, in the Close Opportunity dialog box, you should verify the amount in Actual Revenue and make changes if necessary. You should also set the Status reason to Won. This will update the forecast category of the opportunity to Won.

## Question 2

HOTSPOT -

You experience the following issues when you work with quotes in Dynamics 365 Sales:

- ☞ An administrative assistant is unable to access the function to edit a quote in the system.
- ☞ The Send to customer option is unavailable after you enter a quote.

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	Solution
The administrative assistant is unable to edit a quote.	<ul style="list-style-type: none"><li>Activate the quote.</li><li>Convert the quote to an order.</li><li>Email the quote to the administrative assistant.</li><li>Assign the quote to the administrative assistant.</li></ul>
You are unable to send a quote.	<ul style="list-style-type: none"><li>Save the quote.</li><li>Activate the quote.</li><li>Mark the quote as won.</li><li>Convert the quote to an order.</li></ul>

Answer: 第二个有争议

### Answer Area

Issue	Solution
The administrative assistant is unable to edit a quote.	<ul style="list-style-type: none"><li>Activate the quote.</li><li>Convert the quote to an order.</li><li>Email the quote to the administrative assistant.</li><li>Assign the quote to the administrative assistant.</li></ul>
You are unable to send a quote.	<ul style="list-style-type: none"><li>Save the quote.</li><li>Activate the quote.</li><li>Mark the quote as won.</li><li>Convert the quote to an order.</li></ul>

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

✉  **Pcorreia**  2 years, 1 month ago

4 and 2 - "When your quote is ready to send to your customer, on the command bar, select Activate Quote."

   upvoted 13 times

✉  **Ross22**  2 years, 2 months ago

Correct

"When your quote is ready to send to your customer, on the command bar, select Activate Quote."

   upvoted 7 times

- ✉ **chloaus** Most Recent 3 weeks ago  
4 and 1, 4 because the other 3 are incorrect. 1 because Export to Pdf button appears after the quote is saved. You can still export to pdf and send the quote when quote is in draft mode.  
 upvoted 1 times
- ✉ **Pirozhok** 4 months ago  
My vote is 4 and 1.  
 upvoted 1 times
- ✉ **Nadsjvr5** 2 months, 3 weeks ago  
Not correct, follow the link: <https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/create-edit-quote-sales>  
 upvoted 1 times
- ✉ **Nadsjvr5** 2 months, 3 weeks ago  
4 and 2 is correct.  
 upvoted 1 times
- ✉ **MARIANA123** 11 months, 1 week ago  
Correct  
 upvoted 1 times
- ✉ **EgyermDev** 1 year, 1 month ago  
Answers are correct  
 upvoted 1 times
- ✉ **ceejaybee** 1 year, 2 months ago  
In exam, Jun-22  
 upvoted 1 times
- ✉ **Kyol** 1 year, 7 months ago  
"An administrative assistant is unable to access the function to edit a quote "  
So the answer is to assign to someone who can't do it? #Genius  
 upvoted 2 times
- ✉ **digitalyash86** 1 month, 4 weeks ago  
first 3 options are not correct, assigning the quote is the only possible solution assuming Admin Assistant is not able to edit it bcoz Quote is not assigned to him and he is only having user level edit access.  
 upvoted 1 times
- ✉ **kInv000** 2 years, 2 months ago  
The "Print Quote for Customer" will only be missing when the quote is not saved. I just verified.  
 upvoted 2 times
- ✉ **kInv000** 2 years, 2 months ago  
Answer should be 4 and 1  
 upvoted 1 times
- ✉ **ceejaybee** 1 year, 2 months ago  
Yep, 4 and 1.  
4 is the best answer out of a bad lot for the first question, as you can't "edit" a Quote once Activated, can only Revise it  
1 is best answer to second question. If a user can't "send to customer" it means the Export to PDF button isn't enabled, which means the Quote isn't saved. Once saved, button is enabled, doesn't matter whether Activated or not  
 upvoted 3 times
- ✉ **digitalyash86** 1 month, 4 weeks ago  
Even that is not true, as soon as you click on create Quote button, quote id is generated (means quote is created) and the Export to PDF button gets enabled (as works as expected).  
 upvoted 2 times
- ✉ **JudT** 6 days, 10 hours ago  
Tested.  
 upvoted 1 times

## Question 3

DRAG DROP -

You are implementing Dynamics 365 Sales for a beverage company.

The company sells drinks by individual cans, by the dozen, or by the case of 48 cans as follows:

- ☞ There are three flavors: strawberry, vanilla, and chocolate.
- ☞ Each can costs \$5.00.
- ☞ A dozen cans cost \$55.00.
- ☞ Each case has four dozen cans and costs \$200.00.
- ☞ A combination case includes a dozen cans of each flavor and costs \$160.00.
- ☞ Purchases of four or more cases get an extra 10 percent off the price.

You need to set up the product catalog.

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

NOTE: Each correct selection is worth one point.

Select and Place:

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

Answer:

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

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

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

✉  **HX**  2 years, 1 month ago

I think the answer provided is correct:

- Products: as they are the same price but with different product properties
- Discount Lists: as it states that four or more cases gets a discount
- Product: this is related to the product bundle
- Unit group

   upvoted 26 times

✉  **HassanSarhan**  2 years, 1 month ago

I think the answer :

pricelist

Discount list

unit group

product

   upvoted 9 times

✉  **EgycrmDev** 1 year, 1 month ago

No

- Products
- Discount Lists
- Product: (bundle)
- Unit group

   upvoted 5 times

✉  **MARIANA123**  11 months, 2 weeks ago

Correct answer

   upvoted 1 times

✉  **SashM** 1 year, 5 months ago

isn't the third one price list?

   upvoted 2 times

✉  **SashM** 1 year, 5 months ago

Answer provided is correct.

   upvoted 2 times

✉  **EK1986** 1 year, 6 months ago

on exam 02/22

   upvoted 3 times

✉  **AleMar153** 2 years ago

How's that everyone has a different idea?

   upvoted 6 times

✉  **HassanSarhan** 2 years ago

What do you think?

   upvoted 1 times

✉  **lakshmig** 2 years, 1 month ago

pricelist

unit group

unit group

product

   upvoted 1 times

✉  **IuliaMihaela** 2 years, 1 month ago

The answer should be correct as the combination of flavors can be configured as a bundle, which is stored in the Product entity

   upvoted 6 times

✉  **szkielet** 2 years, 2 months ago

What's the correct answer?

   upvoted 1 times

✉  **ad3791** 2 years, 2 months ago

I think it is

Price list

discount list

discount list

product

   upvoted 1 times

✉  **ad3791** 2 years, 2 months ago

Just kidding the combo of flavors for \$160 is a product because there's no discount being applied. It doesn't get "40%" off it's just priced at \$160

   upvoted 1 times

✉  **erikajasso** 2 years, 2 months ago

I think is

Unit Group

Discount list

Discount List

Product

   upvoted 2 times

✉  **Ahmed\_123** 2 years, 3 months ago

correct answer?

   upvoted 1 times

## Question 4

HOTSPOT -

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

You need to ensure that the lead record is correctly converted.

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

NOTE: Each correct selection is worth one point.

Hot Area:

### Answer Area

Question	Value
Which entity records are created?	<input type="checkbox"/> Account, Contact, and Opportunity <input type="checkbox"/> Only Opportunity and Contact
What is the lead status?	<input type="checkbox"/> Deleted <input type="checkbox"/> Closed <input type="checkbox"/> Open

Answer: 第二个有争议

### Answer Area

Question	Value
Which entity records are created?	<input checked="" type="checkbox"/> Account, Contact, and Opportunity <input type="checkbox"/> Only Opportunity and Contact
What is the lead status?	<input type="checkbox"/> Deleted <input type="checkbox"/> Closed <input checked="" type="checkbox"/> Open

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

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

- ✉  **vieira22**  2 years, 3 months ago  
Lead status is Closed. Answer should be 1.  
   upvoted 21 times
- ✉  **mosolover** 2 years, 3 months ago  
Given answer is correct since you cannot convert or qualify a lead that is already closed.  
   upvoted 4 times
- ✉  **Moonface** 1 year, 8 months ago  
There is a note: "You need to ensure that the lead record is correctly converted." When you converting Lead, status reason is changed to "qualified" and Lead status is closed.  
   upvoted 4 times
- ✉  **Bialix** 2 years, 2 months ago  
Sure but it depends what are they asking. What was lead's status BEFORE or AFTER qualification.  
   upvoted 8 times
- ✉  **Sneha365**  2 years, 3 months ago  
The Lead status should be Qualified and the Opportunity status should be Open  
   upvoted 15 times
- ✉  **chloaus**  3 weeks ago  
1 and 3. Assuming Lead's name and company are provided in lead record, qualifying the lead record will create the contact and account in CRM. Qualify button is only available if lead status is Open.  
   upvoted 1 times
- ✉  **[Removed]** 5 months, 1 week ago  
Q1 seem correct since Manager and Contoso Ltd is given  
Q2 is confusing. The status of the lead should be "Qualified", not Open/Closed/Deleted. Maybe they mean here is the "Opportunity Status", which will be "Open" after the conversion.  
   upvoted 1 times
- ✉  **[Removed]** 5 months, 1 week ago  
I think Q2 is asking what should be the Lead status when we're going to convert it, so it should be Open first.  
   upvoted 1 times
- ✉  **No\_Doubt** 5 months, 2 weeks ago  
Based on the question: What entities are created?  
It means, after qualifying the lead!  
After Qualifying the lead, 3 entities are conditionally created, and based on the given, Account - Contact - Opportunity will be created.  
And since qualifying the lead closes it, correct answer is "Closed"  
   upvoted 2 times
- ✉  **JudT** 2 months ago  
That's right  
   upvoted 1 times
- ✉  **loulou2105** 1 year, 8 months ago  
Just did the test by qualifying a single lead : only Contact and opportunity are created  
So it's 2 - 2  
   upvoted 2 times
- ✉  **brunotw** 1 year, 5 months ago  
The account is only created when the field company is populated  
   upvoted 2 times
- ✉  **lakshmig** 2 years, 1 month ago  
I support 1 and 2 because the question says " ensure that lead is correctly converted" indicating the proper closure.  
   upvoted 1 times
- ✉  **ad3791** 2 years, 2 months ago  
My question is why would you want a lead to be open after it gets qualified or converted? Wouldn't the lead get closed after it is qualified or converted? Otherwise qualified leads would be mixed with open leads and that can cause reporting issues.  
   upvoted 3 times
- ✉  **Ross22** 2 years, 2 months ago  
I am guessing, you are converting an old lead to a new lead therefore the new lead that gets created is of status open. Thus the given answer is correct.  
   upvoted 1 times

Bing:

The lead status would be **Open**. In Dynamics 365 Sales, you use leads to keep track of business prospects that you haven't yet qualified through your sales process <sup>1</sup>. A lead can be an existing client or someone you've never done business with before <sup>1</sup>. When a lead is created, its status is **Open** and its status reason is **New** <sup>2</sup>. You can create a new lead by selecting **Leads** from the sales app, then selecting **New** and following the process bar to enter data into fields to move the lead to the next stage <sup>1</sup>. If you're creating the lead for new customers, you can enter their name, contact details, and company name in the Lead form <sup>1</sup>. You can also add any notes or activities related to this lead in the Timeline section <sup>1</sup>.

## Question 5

You are a Dynamics 365 Sales administrator. You create a discount list.

The sales team needs to use the discount list for opportunities.

You need to ensure that the discount list is available and that products are discounted as expected.

To what should you associate the discount list?

- A. Product
- B. Price list item
- C. Price list
- D. Product family

Answer: B

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

✉️  SKp1200 **Highly Voted** 2 years, 3 months ago

Correct

   upvoted 5 times

✉️  [Removed] **Most Recent** 2 months, 3 weeks ago

**Selected Answer: B**

b. In the Price List Item form, fill in the information, and select Save:

Product. Select the product for which you're creating this price list.

Unit. Select the unit for the product you're creating this price list for.

Currency. The currency defined for the price list is automatically populated.

Discount List. If you want to offer a discount on the products, select a discount list to the price list item.

Quantity Selling Option. select whether the product or service can be ordered in whole, partial, or both types of quantities. This information is used in the Quantity field of Quote Product, Order Product, and Invoice Product records.

   upvoted 1 times

✉️  Jhagirdar 10 months, 4 weeks ago

Correct

   upvoted 1 times

✉️  pumpkin2 1 year, 5 months ago

On exam March 2022

   upvoted 1 times

✉️  Cyriharsh 2 years ago

Yes it is

   upvoted 2 times

## Question 6

A battery manufacturer wants to sell their batteries in boxes of 12 and cases of 24 boxes.

You need to set up a unit group so that the manufacturer can sell different quantities.

What should you create first?

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

Answer: C

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

 **Ross22** Highly Voted 2 years, 2 months ago

Correct

   upvoted 7 times

 **clausi** Most Recent 1 year, 1 month ago

on exam

   upvoted 3 times

 **SalvolAV** 1 year, 4 months ago

Selected Answer: C

Correct

   upvoted 3 times

 **SKpl200** 2 years, 3 months ago

Correct

   upvoted 4 times

## Question 7

A company uses Dynamics 365 Sales.

You need to associate a competitor with each closed opportunity for reporting.

What should you do?

- A. Select the Follow option for the competitor.
- B. Add the competitor to the opportunity close record.
- C. Create a user post for the competitor.
- D. Enable auditing for the competitor entity.

Answer: B

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

✉️  SKp1200  2 years, 3 months ago

Correct

   upvoted 9 times

✉️  [Removed]  2 months, 3 weeks ago

 Selected Answer: B

B. Add the competitor to the opportunity close record.

Select the competitor when you close the opportunity

   upvoted 1 times

✉️  szkielet 2 years, 2 months ago

Why not A?

   upvoted 1 times

✉️  Bialix 2 years, 1 month ago

cause B ;)

You may select competitor on closing opportunity dialog

   upvoted 2 times

✉️  Ross22 2 years, 2 months ago

Correct

   upvoted 3 times

Bing:

To associate a competitor with each closed opportunity for reporting, you should **add the competitor to the opportunity close record**. This can be done by selecting the **Opportunities** tab, and selecting **Add Existing Opportunity**. In the Search box, select the **Lookup** icon, and then select an opportunity from the results . So, the correct answer is **B. Add the competitor to the opportunity close record**. Is there anything else I can help with? 😊

## Question 8

HOTSPOT -

You are a sales representative and use Dynamics 365 Sales.

You are working with the following lead record:

The screenshot shows the Dynamics 365 Sales interface. At the top, there's a navigation bar with options like New, Delete, Refresh, Qualify, Process, Disqualify, Assign, Share, and Email. Below the navigation bar, the lead record for "Lead: Lead" is displayed, with the name "Jim Glynn". On the left, there's a sidebar with sections for Contact, Company, and Other. The main area shows a "Qualify (1 Min)" dialog box. Inside the dialog, under the "Active for 1 minute" section, there are several fields: "Existing Contact?" (set to "Jim Glynn (san)"), "Existing Account?", "Purchase Timeframe", "Estimated Budget", "Purchase Process", and "Identify Decision Maker" (status "completed"). At the bottom of the dialog is a blue "Next Stage >" button. To the right of the dialog, there's a "Develop" button and some social media sharing options (Like, Reply, ...).

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

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

### Answer Choice

Qualify the Lead
Select Next Stage
Select Develop

Which new record or records are created?

only an Opportunity
only an Account and a Contact
only an Account and an Opportunity
an Account, a Contact, and an Opportunity

ET User:

Qualify the Lead

Only an Opportunity

<https://learn.microsoft.com/en-us/training/modules/manage-leads-dynamics-365-sales/4-lead-qualification>

✉ **Jekkie** Highly Voted 2 years, 3 months ago

The second question should be 'only an Opportunity' since the Account field is empty on the Lead form. Therefor it will not auto-create an Account. Since an 'Existing Contact' is filled, no Contact will be created either.

Like Share Flag upvoted 36 times

✉ **Newb007** 1 week, 1 day ago

<https://learn.microsoft.com/en-us/training/modules/manage-leads-dynamics-365-sales/4-lead-qualification>

Like Share Flag upvoted 1 times

✉ **mel28** 1 year, 9 months ago

if account field is empty, it WILL create an account record when qualifying the lead?? Since the contact is existing, no new record will be created

Like Share Flag upvoted 4 times

✉ **Iummi** 1 year, 11 months ago

thats incorrect teste

Like Share Flag upvoted 1 times

✉ **JoeS007** 1 year, 8 months ago

I just tested it. Only an opportunity was created when the account field was blank.

Like Share Flag upvoted 5 times

✉ **ibrc** 2 years, 3 months ago

i agree

Like Share Flag upvoted 1 times

✉ **loulou2105** 1 year, 8 months ago

It actually depends if the company field was filled or not.  
If it's filled then an account will be created when the lead will be qualified

Like Share Flag upvoted 3 times

✉ **jeopena** Highly Voted 2 years, 1 month ago

Tested in Sandbox. Answer: 1,1

Reason for Q1 is when you click on Next Stage, you still need to link it to an Opportunity as compared to just Qualifying the record which automatically creates the Opportunity and moves to the next stage satisfying the requirement.

Reason for Q2: You already have the Contact, so only Opportunity is created

Like Share Flag upvoted 9 times

✉ **jth** 1 year, 11 months ago

I also tested and can confirm that you need to qualify to move to next stage, and that only an Opportunity is created. No account is created

Like Share Flag upvoted 3 times

✉ **[Removed]** Most Recent 2 months, 3 weeks ago

Only the opportunity will be created. For the first one you need to qualify the lead

Like Share Flag upvoted 1 times

✉ **isruuudara** 5 months, 2 weeks ago

- Qualify the Lead

- Only an Opportunity

Since the company name is blank there will not be any Account created.

Like Share Flag upvoted 1 times

✉ **No\_Doubt** 5 months, 2 weeks ago

Should be

- Qualify the Lead

- Only the Opportunity: since "Company" name in the bottom-left isn't entered, the process will not create the account!

Like Share Flag upvoted 1 times

✉ **Rosia** 6 months, 1 week ago

Q2: If the contact already exists and the account field is empty when qualifying a lead, a new account record will be created when the lead is converted. The new account will be associated with the newly created opportunity and the existing contact record.

This is because an opportunity record requires an associated account record, and if the account field is left empty, a new account record must be created to fulfill this requirement. The existing contact will be associated with the new account and opportunity records as the primary contact.

Like Share Flag upvoted 3 times

✉ **Gosalisnehal** 1 year, 3 months ago

1 Qualify the lead, 1 Opportunity Only

Like Share Flag upvoted 1 times

✉ **pumpkin2** 1 year, 5 months ago

On exam March 2022

Like Share Flag upvoted 1 times

✉ **MiguelNepomuceno** 2 years, 1 month ago

TESTED Question 1. When you select Next Stage, you have to select an existing Opportunity record. Qualify Lead automatically moves you to this Stage.

Like Share Flag upvoted 4 times

✉ **HassanSarhan** 2 years, 2 months ago

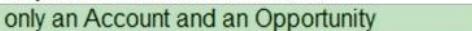
for the first question why not select the next stage?

Like Share Flag upvoted 6 times

-  ad3791 2 years, 2 months ago  
If you select next stage it enters the next stage. I'm not sure why qualifying the lead would be the first thing on a salesperson's mind to advanced to the next stage  
   upvoted 3 times
-  ElTonton76 2 years, 3 months ago  
there is no information in the company field of the lead so only an opportunity will be created, no account, contact exists, no information for company; so only an opportunity will be created  
   upvoted 4 times

ET Answer:

### Answer Area

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

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

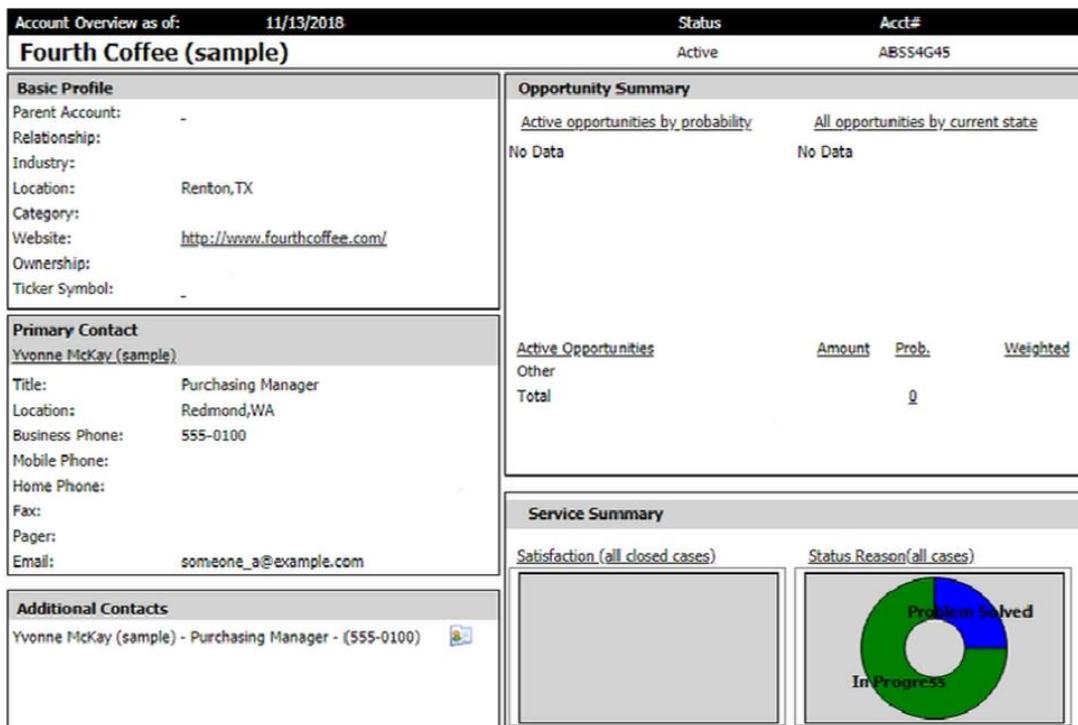
Reference:

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

## Question 9

HOTSPOT -

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



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

NOTE: Each correct selection is worth one point.

Hot Area:

### Answer Area

#### Question

Why is the satisfaction area blank?

#### Answer choice

- There are no closed cases.
- Users are not completing the satisfaction field.
- The Reporting Service is down.
- Cases with the problem solved have not been closed.

Which type of account is Fourth Coffee?

- Active
- Parent Account
- Inactive
- Child Account

Answer: 重复题

## Answer Area

### Question

Why is the satisfaction area blank?

### Answer choice

There are no closed cases.
Users are not completing the satisfaction field.
The Reporting Service is down.
Cases with the problem solved have not been closed.

Which type of account is Fourth Coffee?

Active
Parent Account
Inactive
Child Account

✉  **djordii**  1 year, 10 months ago

active and inactive is the state of the account. Not the type account. Correct answer should be parent. (same questions as 25)

   upvoted 15 times

✉  **[Removed]**  2 months, 3 weeks ago

Satisfaction could be blank because the resolved cases aren't closed as well no?

   upvoted 1 times

✉  **JonahWagoner** 11 months, 1 week ago

Has anyone confirmed if the exam marks it correct as a parent account or an active account?

   upvoted 2 times

✉  **MARIANA123** 11 months, 1 week ago

The answer is correct

   upvoted 2 times

✉  **Joshmart** 1 year, 10 months ago

It is an active Account

   upvoted 1 times

## Question 10

HOTSPOT -

You have a sales report that shows activities for Accounts in the last 30 days. When you run an advanced find query for Accounts with the custom field Heat Level equal to Hot, you are not able to access the report.

The screenshot shows the 'Report: Accounts Activity last 30 days' configuration screen. At the top, there are standard CRM navigation buttons: File, Save and Close, Run Report, Actions, and Help. The title bar displays the report name and the message 'Working on solution: Default Solution'. Below the title bar, a yellow status bar says 'Your report has been saved. You can edit the properties of the report, or close this form.' The main area is divided into sections: 'Source' (Report Type set to 'Report Wizard Report'), 'Details' (Name set to 'Accounts Activity last 30 days', Description is empty), 'Parent Report' (empty), 'Categorization' (Categories, Related Record Types set to 'Accounts', Display In set to 'Forms for related record types;Reports area', Languages set to English). The 'Report Wizard' button is also visible under the Source section.

A Form: Report: Account Activity last 30 Days

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

Question	Answer choice
Which area of the current form should you use to ensure the report is accessible from Advanced Find results?	Display In Categories Related Record Types Report Wizard Administration
Which value should you set to make the report available for Advanced Find results?	Lists for related records types Sales Reports Activities Reports area

ET User: 争议，选的最多的如下：

Display In

Lists for related record types

✉  Kratinhos  1 year, 3 months ago

On exam 27/4/22. Passed. I selected

Display In

Lists for related record types

   upvoted 8 times

✉  berg98  1 year, 1 month ago

Checkt it \_ Area => Display In and the Value => List for related record types  
so it is 1 and 1

after that - this is not part of the question - you must set in the area Related Record Types  
a value like Account, Activity etc.

   upvoted 3 times

✉  ceejaybee 1 year, 2 months ago

In exam, Jun-22 (similar question, not exactly the same)

   upvoted 2 times

✉  Gosaisnehal 1 year, 3 months ago

1,1

Display In

Lists for related record types

   upvoted 4 times

✉  Yvesk 1 year, 3 months ago

Display In

Reports Area

   upvoted 2 times

Answer:

#### Answer Area

##### Question

Which area of the current form should you use to ensure the report is accessible from Advanced Find results?

Which value should you set to make the report available for Advanced Find results?

##### Answer choice

Display In
Categories
Related Record Types
Report Wizard
Administration

Lists for related records types
Sales Reports
Activities
Reports area

## Question 11

DRAG DROP -

The product development team for a toy company creates a new remote-control toy. You need to create the necessary records and record relationships to sell the product. Which five records and/or components should you configure in sequence? To answer, move the appropriate records and/or components from the list of records and components to the answer area and arrange them in the correct order.

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

Select and Place:

Records and Components	Answer Area
units	 
products	
price lists	 
product families	
price list items	
discount lists	
unit groups	

ET User:

- unit groups
- units
- products
- price lists
- price list items

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

<https://docs.microsoft.com/en-us/learn/modules/manage-organize-product-catalog-dynamics-365-sales/1-product-catalog-overview>

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

<https://neilparkhurst.com/2019/02/28/mb-210-microsoft-dynamics-365-for-sales-product-catalog-introduction>

✉  **YUP5588**  2 years, 9 months ago

Should be:

- unit groups
- units
- products
- price lists
- price list items

   upvoted 71 times

✉  **KevH** 2 years, 9 months ago

Totally Agree

   upvoted 6 times

✉  **EiTonton76**  2 years, 3 months ago

<https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/set-up-product-catalog-walkthrough>:  
( Discount list- Optional)

- Unit Groups
- units
- Products
- Price Lists
- Price List Items

if we have to keep 5 it would be the last 5 for me

   upvoted 10 times

✉  **[Removed]**  2 months, 3 weeks ago

Agree:

- unit groups
- units
- products
- price lists
- price list items

Need to create the price list before pricelist items can be added

   upvoted 1 times

✉  **mel28** 1 year, 7 months ago

This was on exam as of 12/23/21 !!!!

   upvoted 1 times

✉  **A\_A\_C** 2 years, 5 months ago

Should be :

- Discount list (Optional)
- Unit Groups
- Products
- Price Lists
- Price List Items

<https://docs.microsoft.com/en-us/learn/modules/manage-organize-product-catalog-dynamics-365-sales/1-product-catalog-overview>

   upvoted 6 times

✉  **SashM** 1 year, 4 months ago

You forgot unit. this is correct answer:

Unit group

unit

product

price lists

price list items

   upvoted 2 times

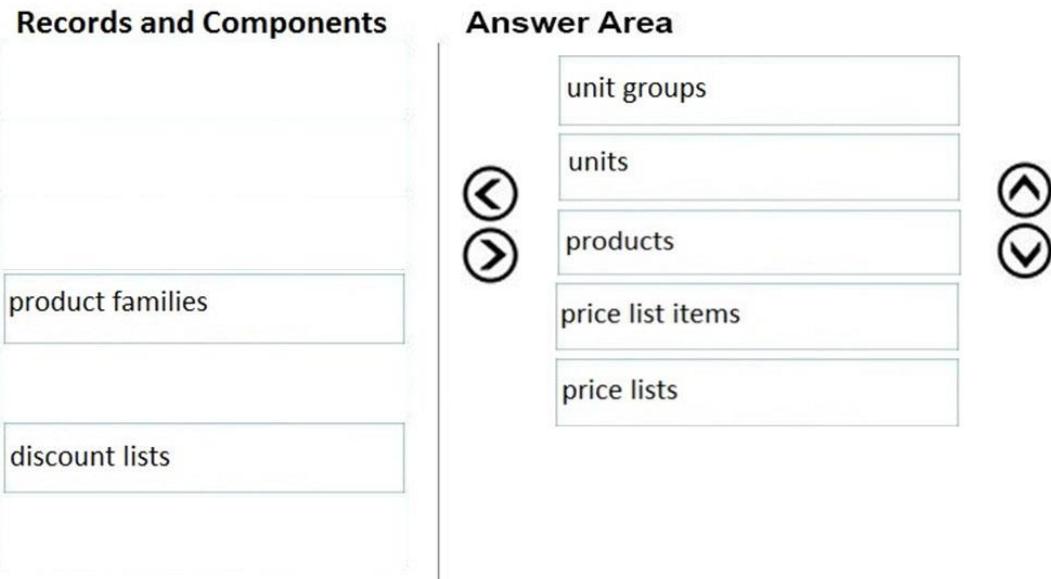
✉  **Dean0918** 2 years, 5 months ago

- unit groups
- units
- products
- price lists
- price list items

   upvoted 1 times

- ✉ **jkaur** 2 years, 6 months ago  
Unit Groups  
-Units  
-Product  
-Price List  
-Price List Item  
    ↑ ↓ ↗ upvoted 4 times
- ✉ **clintolin** 2 years, 7 months ago  
unit groups, units, products, price lists, price list items. How could you create a price list item without a price lis?  
<https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/create-price-lists-price-list-items-define-pricing-products>  
    ↑ ↓ ↗ upvoted 3 times
- ✉ **Deimt** 2 years, 8 months ago  
unit group,  
unit,  
price lists,  
price list items,  
products  
should be fine too, right?  
    ↑ ↓ ↗ upvoted 1 times
- ✉ **Nataliia** 2 years, 8 months ago  
No. Initially it needs to create a Product to add it to the Price list. <https://docs.microsoft.com/en-us/learn/modules/manage-organize-product-catalog-dynamics-365-sales/1-product-catalog-overview>  
    ↑ ↓ ↗ upvoted 3 times
- ✉ **IhatethisNickname** 2 years, 8 months ago  
It says that more than one order of answer choices is correct, so I think the Ans is correct too  
    ↑ ↓ ↗ upvoted 1 times
- ✉ **Bialix** 2 years, 1 month ago  
its not cause you can't create price list item without price list ;)  
  
Even more, it's not said that units doesn't exists.  
You may start from product family, then product, then price list, price list item and discount list (why not? ;))  
    ↑ ↓ ↗ upvoted 1 times
- ✉ **MireiaRC** 2 years, 9 months ago  
Should be:  
- units  
- unit groups  
- products  
- price lists  
- price list items  
<https://neilparkhurst.com/2019/02/28/mb-210-microsoft-dynamics-365-for-sales-product-catalog-introduction/>  
    ↑ ↓ ↗ upvoted 6 times

ET Answer:



Bing:

To sell the new remote-control toy, you should configure the following records and components in sequence:

1. **Unit groups**: Create a unit group to define the unit of measure for the product [1](#).
2. **Units**: Create units within the unit group to define how the product is sold, such as by individual item or by the case [1](#).
3. **Products**: Create a product record for the new remote-control toy and associate it with the unit group and unit [1](#).
4. **Price lists**: Create a price list to define the prices for the product [1](#).
5. **Price list items**: Create price list items within the price list to define the price of the product for each unit of measure [1](#).

You can also create **product families** to group related products together and create **discount lists** to offer discounts on products or product bundles [1](#). However, these are not necessary for selling the product and can be configured later if desired.

## Question 12

HOTSPOT -

You send a quote to a client. The client calls and negotiates a better price.

You need to send an updated quote to the client.

What is required to modify the quote? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

### Answer Area

Question	Response
Which action should you perform?	<ul style="list-style-type: none"><li>Revise</li><li>Close Quote</li><li>Deactivate</li><li>Reopen Quote</li></ul>
What is the resulting status for the quote after you perform the action?	<ul style="list-style-type: none"><li>Draft</li><li>Revised</li><li>In Progress</li><li>Open</li></ul>

Answer:

### Answer Area

Question	Response
Which action should you perform?	<ul style="list-style-type: none"><li>Revise</li><li>Close Quote</li><li>Deactivate</li><li>Reopen Quote</li></ul>
What is the resulting status for the quote after you perform the action?	<ul style="list-style-type: none"><li>Draft</li><li>Revised</li><li>In Progress</li><li>Open</li></ul>

  **Cyriharsh** Highly Voted  2 years ago

Sorry mates, I just misunderstood the 2nd question here. Quote status when it gets revised is Draft indeed.

   upvoted 12 times

  **HassanSarhan** 1 year, 12 months ago

Yes right thanks, write a reply to your other comment to avoid confusion other guys.

   upvoted 3 times

- ✉  **Rachele**  1 year, 8 months ago  
Status will be Draft. In Progress is of Status Reason  
   upvoted 7 times
- ✉  **EgycrmDev**  1 year, 1 month ago  
Correct  
   upvoted 1 times
- ✉  **ceejaybee** 1 year, 2 months ago  
Another confusingly-worded question. Seems to be referring to the old quote which would be Status = Closed, Status Reason = Revised. However, Status of Closed is not given as an option. So Rachele is correct, it must be referring to new quote, which is Status = Draft (Status Reason = In Progress)  
   upvoted 3 times
- ✉  **justin\_s** 1 year, 2 months ago  
you are right, thank you ! I take back my comment.  
   upvoted 1 times
- ✉  **justin\_s** 1 year, 2 months ago  
The question is "what is the status for THE QUOTE after you perform the action.", so THE QUOTE is the old one, or the new created one? It said ".....after you perform the action", so I think it's the old one, so the status is Revised.  
   upvoted 2 times
- ✉  **SalvolAV** 1 year, 4 months ago  
Given answer is correct  
   upvoted 2 times
- ✉  **Cyriharsh** 2 years, 1 month ago  
1. Revise  
2. In Progress  
Quote status remains In Progress after Activation, just tested.  
   upvoted 4 times
- ✉  **ShawM** 2 years ago  
I did the same test and the result was other. After revise the quote, the status modified to DRAFT. So, the answer is:  
1. Revise  
2. Draft  
   upvoted 9 times
- ✉  **HassanSarhan** 1 year, 12 months ago  
Correct! thank you  
   upvoted 1 times

## Question 13

You create an invoice with products and services for a customer.

You need to add pricing for a product that is not available in the product catalog.

What should you do?

- A. Add the product to the order and use Get Products
- B. Add a write-in product
- C. Add an existing product and change the name and price
- D. Add the product to the quote and use Get Products

Answer: B

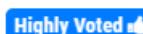
<https://docs.microsoft.com/en-us/dynamics365/customer-engagement/sales-enterprise/add-product-quote-order-invoice>

✉  **Preety**  3 years, 6 months ago

in exam

Answer is correct - Add write-in Product

   upvoted 10 times

✉  **Rachha**  3 years, 2 months ago

add write in product

   upvoted 5 times

✉  **No\_Doubt**  5 months, 2 weeks ago

**Selected Answer: B**

Correct

   upvoted 1 times

✉  **jkaur** 2 years, 6 months ago

correct

   upvoted 4 times

✉  **Subodh** 3 years, 7 months ago

in exam

   upvoted 4 times

## Question 14

You are a Dynamics 365 Sales administrator.

The sales team is having difficulty locating related products.

You need to make it easier for the sales team to find groups of products that are similar.

What should you use?

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

ET User:

**C (88%)**

**13%**

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

<https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/define-related-products-increase-chances-sales>

<https://neilparkhurst.com/2019/03/12/mb-210-microsoft-dynamics-365-for-sales-product-catalog-families-and-properties/>

<https://neilparkhurst.com/2019/03/29/mb-210-microsoft-dynamics-365-for-sales-product-catalog-suggestions-relationships/>

<https://docs.microsoft.com/en-us/learn/modules/manage-organize-product-catalog-dynamics-365-sales/4-product-families>

✉ guest81 **Highly Voted** 3 years, 7 months ago  
C- Product Families

"Make it easier for sales agents to find products and services in a product catalog by creating a product family and classifying similar products in it. A product family lets you group and categorize products, making it easier for you to manage them."

<https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/create-product-family>  
↑ upvoted 48 times

✉ Stasy 3 years, 7 months ago  
But you can not configure product family with related products!  
↑ upvoted 2 times

✉ Asadipour 4 weeks, 1 day ago  
By using the Product Family, products are related in somehow!  
↑ upvoted 1 times

✉ pootietang **Highly Voted** 2 years, 3 months ago  
Product Families is the correct answer.

Question asks for "find groups of products that are similar".

Related products can literally be any product. If your product is a shirt, a related product could be pants, glasses, hats, shoes etc.

Product families however allows you to group similar products together. If your product family was shirts, similar products within the product family would be Hawaiian shirts, Work shirts, Athletic shirts etc.

↑ upvoted 15 times

✉ digitalyash86 **Most Recent** 1 month, 3 weeks ago

Selected Answer: C  
Product Families is the correct answer.  
↑ upvoted 1 times

- ✉ **utk22** 10 months, 3 weeks ago  
**Selected Answer: C**  
PRODUCT FAMILY  
Like Reply Upvote upvoted 1 times
- ✉ **EgycrmDev** 1 year, 1 month ago  
**Selected Answer: C**  
Product family  
Like Reply Upvote upvoted 1 times
- ✉ **Possumus** 1 year, 1 month ago  
**Selected Answer: C**  
Product Families  
Like Reply Upvote upvoted 1 times
- ✉ **Gosainsnehal** 1 year, 3 months ago  
**Selected Answer: C**  
It should be C Product families, related products are for upselling, cross-sell, e.g. computer accessories whereas with product family you could find similar products hp computer, dell computer  
Like Reply Upvote upvoted 1 times
- ✉ **dre34** 1 year, 4 months ago  
**Selected Answer: C**  
should be C  
Like Reply Upvote upvoted 1 times
- ✉ **SashM** 1 year, 4 months ago  
**Selected Answer: A**  
A is correct.  
Like Reply Upvote upvoted 1 times
- ✉ **SashM** 1 year, 4 months ago  
A is correct.  
What are related products?  
A related product could be an accessory, cross-sell, substitute, or up-sell. For example, for a Microsoft Surface Pro product, you can add Microsoft Surface Book as an up-sell product so that when your sales agent is adding Microsoft Surface Pro to any opportunity, quote, order, or invoice, Microsoft Surface is suggested as the up-sell option.
- The related products are displayed as suggestions to your sales agents during opportunity or order management. These suggestions help your sales agents recommend related products and bundles/kits to the customers, and increase product sales.  
Like Reply Upvote upvoted 2 times
- ✉ **christosp619** 1 year, 6 months ago  
**Selected Answer: C**  
Answer is C.  
"Make it easier for sales agents to find products and services in a product catalog by creating a product family..."  
<https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/create-product-family>
- For related product: "The related products are displayed as suggestions to your sales agents during opportunity or order management...."  
<https://docs.microsoft.com/en-us/dynamics365/sales/define-related-products-increase-chances-sales>  
Like Reply Upvote upvoted 1 times
- ✉ **Dotsz** 1 year, 7 months ago  
I think C is the answer - <https://docs.microsoft.com/en-us/dynamics365/sales/create-product-family>
- Set up product families  
Article  
12/07/2021  
2 minutes to read
- Is this page helpful?
- Make it easier for sales agents to find products and services in a product catalog by creating a product family and classifying similar products.  
Like Reply Upvote upvoted 1 times
- ✉ **mel28** 1 year, 9 months ago  
READ the question: "find GROUPS of products that are similar."  
its product families  
Like Reply Upvote upvoted 2 times
- ✉ **lakshmi9** 2 years, 1 month ago  
i vote for related products  
Like Reply Upvote upvoted 2 times
- ✉ **Dean0918** 2 years, 5 months ago  
A is correct.  
Like Reply Upvote upvoted 4 times
- ✉ **sk\_cert** 2 years, 5 months ago  
<https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/create-product-family>  
"Make it easier for sales agents to find products and services in a product catalog by creating a product family and classifying similar products in it. A product family lets you group and categorize products, making it easier for you to manage them"
- Answer is C  
Like Reply Upvote upvoted 2 times

✉  **jkaur** 2 years, 6 months ago

Correct Answer: A

<https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/define-related-products-increase-chances-sales>

   upvoted 4 times

✉  **isbou** 3 years ago

Correct answer is A.

the question is functional, sometimes salesmen try to find alternative products to propose to customer (when sold out for example), there is the interest of the functionality "related product".

   upvoted 3 times

✉  **Rachha** 3 years, 2 months ago

A IS CORrect ans

   upvoted 2 times

✉  **Mukesh87Prasad** 3 years, 2 months ago

A is correct ans

   upvoted 3 times

✉  **burntsecondary** 3 years, 3 months ago

Surprisingly the link provided in the answer seems to make it clear that they are looking for A. I don't see why that would be wrong. I quoted the first two paragraphs of the Microsoft documentation below.

   upvoted 3 times

✉  **burntsecondary** 3 years, 3 months ago

Improve your opportunities to increase sales by adding related products as suggestions for up-sell, cross-sell, accessories, or substitutes. Defining related products will help your sales agents with their recommendations to customers. You can add related products to a product or product bundle, but not to product families.

The related products are displayed as suggestions to your sales agents during opportunity or order management. These suggestions help your sales agents recommend related products and bundles/kits to the customers, and increase product sales. You can define the following relationships for a product: Accessory, cross-sell, substitute, and up-sell. For example, for a Microsoft Surface Pro product, you can add Microsoft Surface Book as an up-sell product so that when your sales agent is adding Microsoft Surface Pro to any opportunity, quote, order, or invoice, Microsoft Surface is suggested as the up-sell option.

   upvoted 3 times

✉  **burntsecondary** 3 years, 3 months ago

<https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/define-related-products-increase-chances-sales>

   upvoted 2 times

✉  **[Removed]** 3 years, 4 months ago

Answer should be C

<https://neilparkhurst.com/2019/03/12/mb-210-microsoft-dynamics-365-for-sales-product-catalog-families-and-properties/>

"Product families enable companies to group related products or product bundles together. For example, a supermarket might use product families to group canned products, fresh products and such like together. This helps with sales analysis and definition of product properties across all products in the family. It is possible to create a hierarchy of product families. In my example of supermarket products, canned goods might be made up of further "child" families. Maybe canned vegetables, canned fish, canned meat etc."

   upvoted 8 times

✉  **BoxonToxonFiop** 2 years, 8 months ago

Related Products: <https://neilparkhurst.com/2019/03/29/mb-210-microsoft-dynamics-365-for-sales-product-catalog-suggestions-relationships/>

"Product relationships can be used to "link" products for a variety of purposes including up-sales, cross sales, accessories or substitutions"

   upvoted 5 times

✉  **iThem** 3 years, 5 months ago

I think better choice is = Related Products

Because : Families are more used when you form a package

related products: is like when you are buying an Apple iphone, you have also choice Samsung Galaxy and

Products families : we can add in a list a CPU, a HDD, a RAM and a Mouse for gamer

   upvoted 4 times

✉  **Moppu** 2 years, 4 months ago

No, this is incorrect. Product families are used to define product hierarchies. Including different products in a group like that is a Product Bundle.

   upvoted 1 times

✉  **Brex** 3 years, 5 months ago

The correct answer is A. But you need to relate the product or product bundle using a product relationship which is similar to connections but for products. See <https://docs.microsoft.com/en-us/learn/modules/manage-organize-product-catalog-dynamics-365-sales/4-product-families>

   upvoted 3 times

✉  **remo** 3 years, 7 months ago

You can add related products to a product or product bundle, but not to product families. Hence, B is the right answer.

<https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/define-related-products-increase-chances-sales>

   upvoted 3 times

✉ **Stasy** 3 years, 6 months ago

I also think so

1 upvoted 1 times

✉ **Marduk** 3 years, 6 months ago

the question says "find groups of products that are similar", when creating related products you can ask for products or bundles. I think the answer is A, since the sales team adds the products in the opportunity and when they look for them they don't see the families, they only see products or bundles and about them if they can see the product suggestions.

1 upvoted 2 times

✉ **Subodh** 3 years, 7 months ago

A and C both are correct, which one to select?

Can anyone please confirm?

1 upvoted 3 times

✉ **PRASHANTPT** 2 years, 8 months ago

Select F

1 upvoted 3 times

✉ **Yogeshwar** 3 years, 8 months ago

<https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/define-related-products-increase-chances-sales>

1 upvoted 4 times

ET Answer: A

<https://docs.microsoft.com/en-us/dynamics365/customer-engagement/sales-enterprise/define-related-products-increase-chances-sales>

Bing:

To make it easier for the sales team to find groups of products that are similar, you should use **Product families**. A product family lets you group and categorize products, making it easier for you to manage them. With product families, you can categorize your products in whichever way is most meaningful to your organization and create child products and product bundles within a product family <sup>1</sup>. This will help the sales team to easily locate related products. So the correct answer is **C. Product families**. Is there anything else I can help with? 😊

## Question 15

You are a salesperson using Dynamics 365 Sales.

You need to be able to modify the product price on an active invoice that uses current pricing.

What should you do?

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

Answer: A

<https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/add-product-quote-order-invoice>

✉ **wwaki** Highly Voted 3 years, 7 months ago

It looks like A:

- <https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/add-product-quote-order-invoice>

👍 ↗️ 🎉 upvoted 15 times

✉ **Marduk** 3 years, 6 months ago

Yes, the answer is A, since when selecting Override Price in a product, its price is enabled to be modified.

👍 ↗️ 🎉 upvoted 7 times

✉ **Kratinhos** Most Recent 1 year, 3 months ago

On exam 27/4/22. Passed. I selected same answer

👍 ↗️ 🎉 upvoted 2 times

✉ **jkaur** 2 years, 6 months ago

Correct Answer: A

<https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/add-product-quote-order-invoice>

👍 ↗️ 🎉 upvoted 1 times

✉ **Rachha** 3 years, 2 months ago

A correct ans

👍 ↗️ 🎉 upvoted 2 times

✉ **KevH** 2 years, 9 months ago

Tried and Tested. Correct answer

👍 ↗️ 🎉 upvoted 5 times

✉ **[Removed]** 3 years, 6 months ago

Well option A is closest to the correct answer, but changes can only be made to a draft quote and not to an "active one", so the question doesn't really have any correct answer.

👍 ↗️ 🎉 upvoted 2 times

✉ **Subodh** 3 years, 7 months ago

In exam question

👍 ↗️ 🎉 upvoted 4 times

✉ **Subodh** 3 years, 7 months ago

Can anyone please confirm this ?

👍 ↗️ 🎉 upvoted 3 times

## Question 16

A company uses Dynamics 365 for Sales.

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

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

What should you do?

- A. Activate the quote
- B. Select Get Products from the command bar in the Quote entity
- C. Select Add Line Items on the Opportunity entity
- D. Select Recalculate from the command bar on the Opportunity entity

Answer: B

<https://docs.microsoft.com/en-us/learn/modules/process-sales-orders-dynamics-365-sales/2-quotes-and-quote-management>

✉️  **Preety**  3 years, 6 months ago

B is correct answer.

IN Exam

   upvoted 17 times

✉️  **mariats**  3 years, 2 months ago

B is correct - <https://docs.microsoft.com/en-us/learn/modules/process-sales-orders-dynamics-365-sales/2-quotes-and-quote-management>

   upvoted 9 times

✉️  **jkaur**  2 years, 6 months ago

correct

   upvoted 2 times

✉️  **Rachha** 3 years, 2 months ago

b correct ans (get products)

   upvoted 3 times

✉️  **Subodh** 3 years, 7 months ago

In exam question

   upvoted 3 times

Bing:

To display all your items from the opportunity in the quote, you should **select Get Products from the command bar in the Quote entity**. When you create a quote from an opportunity, the quote form is prefilled with important details from the opportunity record <sup>1</sup>. To add products from your opportunity to your quote, on the command bar of the Quote form, select **Get Products** <sup>1</sup>. You can then add more products or remove existing ones from the Products area <sup>1</sup>. So the correct answer is **B. Select Get Products from the command bar in the Quote entity**. Is there anything else I can help with? 😊

## Question 17

An organization attends a tradeshow and identifies several leads.

One specific lead wants to make a purchase in the next week.

You need to create an invoice.

At which stage can you create the invoice?

- A. Lead
- B. Order
- C. Opportunity
- D. Quote

Answer: B

✉ **Vikash** 3 years, 6 months ago

Correct

upvoted 20 times

✉ **jkaur** 2 years, 6 months ago

Correct

upvoted 4 times

✉ **redfly61** 2 years, 11 months ago

Are you all agree?

In this way someone must manually create the Account and starting the process from the Order we also loss any relationship with the Lead, this could be a problem analyzing the revenue from the tradeshow.

Couldn't be better start the process from the beginning?

Create a Lead->Qualify(This step create Account and Opportunity)->Create a Quote->Create the Order->Create the Invoice.

I know, It's a lot of steps, but most of them are automatically done.

I'm not sure, It's only a question...

upvoted 1 times

✉ **Druey** 2 years, 8 months ago

You're right, but in the end also you affirm that you create the invoice from the Order, so stop overthinking, Order is the right answer

upvoted 8 times

✉ **avamin** 3 years ago

Invoice can be created in any stage...

upvoted 3 times

✉ **sammilee285** 2 years, 11 months ago

The correct answer is Order because you can't create directly from any of the listed entities. Yes, invoice can be created from scratch at any stage of the process by manually going into Invoice entity and creating new. But from a process perspective, the only place you can create it is from the Order record. Even though you can link an invoice to an Opportunity directly but this must be done from scratch, i.e. Create new Invoice from scratch, add Opportunity lookup

upvoted 9 times

✉ **Rachha** 3 years, 2 months ago

order is correct ans

upvoted 1 times

Bing:

In Dynamics 365 Sales, you can create an invoice from an **Order**. When a customer places an order, you can create an invoice to bill them for the upcoming sale <sup>1</sup>. Typically, you convert an order into an invoice; however, you can also create an invoice that does not originate from an order <sup>1</sup>. So the correct answer is **B. Order**. Is there anything else I can help with? 😊

## Question 18

You are a Dynamics 365 system customizer. You create a price list with related products.

Sales team members use the list to generate opportunities, quotes, and orders.

You need to create a product family.

What should you do?

- A. Add a new product family to an existing product family
- B. Delete the existing price list and create a new one
- C. Create a unit group for use with the product family
- D. Add a parent product family to an existing product family

Answer: A

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

✉  christosp619 1 year, 6 months ago

**Selected Answer: A**

Correct Answer: A

   upvoted 2 times

✉  jkaur 2 years, 6 months ago

Correct Answer: A

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

   upvoted 4 times

✉  erreiwani 2 years, 7 months ago

A is correct

   upvoted 2 times

✉  ShawM 2 years, 9 months ago

Thanks Victor, you can explain clearly!

   upvoted 2 times

✉  Rachha 3 years, 2 months ago

A

Thanks Victor for explaining

   upvoted 3 times

✉  Gus23 3 years, 2 months ago

Q: You need to create a product family to be added to the price list. What should you do?

Answer's correct

   upvoted 1 times

  **Stasy** 3 years, 6 months ago

I can't understand the question...Can anybody please explain me?

   upvoted 3 times

  **Victor123** 3 years, 6 months ago

The question is as bit stupid. But the answer is correct, so A. If you go through the answers it makes sense:

- A. Add a new product family to an existing product family - correct you can do that, because you will set the existing Product family as parent
- B. Delete the existing price list and create a new one - you should never delete existing price list which was used on Opportunity
- C. Create a unit group for use with the product family - Creating new Unit group is useless when you need a new Product family
- D. Add a parent product family to an existing product family - adding parent Product family to existing Product family is not possible because once you created it the field is locked

   upvoted 58 times

  **digitalyash86** 1 month, 3 weeks ago

Your A and B are contradictory. In both scenario, you are talking about updating Parent Product Family which can be achieved by unpublish the Product Family (if its already published).

   upvoted 1 times

  **HassanSarhan** 1 year, 12 months ago

Good explanation, thanks you

   upvoted 2 times

  **EgycrmDev** 1 year, 1 month ago

Thanks

   upvoted 1 times

  **SN09** 3 years, 6 months ago

I cant understand the question too  
could anybody explain please!

   upvoted 1 times

## Question 19

You are creating orders from quotes in Dynamics 365.

In some circumstances, customers no longer require an order. In other circumstances, your company delivers the order.

You need to ensure that closed orders use existing functionality to reflect the circumstances.

Which two methods of closing an order are available out of the box? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

- A. Cancel
- B. Activate
- C. Accept
- D. Fulfill

Answer: AD

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

<https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/create-edit-order-sales#typical-next-steps>

👤 Preety Highly Voted 3 years, 6 months ago

A and D are correct answers  
Upvoted 17 times

👤 Subodh Highly Voted 3 years, 7 months ago

in exam question  
Upvoted 8 times

👤 AP2020 Most Recent 7 months, 1 week ago

Selected Answer: AD

Correct  
Upvoted 1 times

👤 SashM 1 year, 4 months ago

Correct answer.

"You close an order by either fulfilling the order or canceling the order. Products or services that are shipped are fulfilled. You should cancel orders for any products or services that are not shipped."

Upvoted 1 times

👤 yp 2 years, 6 months ago

A and D are correct answers  
Upvoted 2 times

👤 WASSIM2020 2 years, 7 months ago

Correct:  
<https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/create-edit-order-sales#typical-next-steps>  
Upvoted 3 times

👤 owen777 2 years, 7 months ago

Correct  
Upvoted 1 times

👤 Hninhnin22 2 years, 8 months ago

Correct  
Upvoted 1 times

👤 Rachha 3 years, 2 months ago

cancel and fulfill  
Upvoted 1 times

## Question 20

You are a Dynamics 365 for Sales administrator. You are setting up a product catalog.

You need to configure the base unit group.

Which quantity or measurement should you configure?

- A. the highest needed to sell the product or service
- B. the least frequently used to sell the service
- C. the most frequently used to sell the service
- D. the lowest needed to sell the product or service

Answer: D

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

<https://www.youtube.com/watch?v=AljnXxF6qwg>

<https://docs.microsoft.com/en-us/dynamics365/project-operations/sales/sales-units-unit-groups>

✉️  **lucasbusquier**  3 years, 5 months ago

Correct.

"Primary Unit. Enter the lowest common unit of measure that the product will be sold in."

   upvoted 9 times

✉️  **The12Anonym** 3 years, 2 months ago

can confirm, also mentioned in this video: <https://www.youtube.com/watch?v=AljnXxF6qwg>

   upvoted 3 times

✉️  **yp**  2 years, 6 months ago

The lowest unit. Similar as in project operation <https://docs.microsoft.com/en-us/dynamics365/project-operations/sales/sales-units-unit-groups>

   upvoted 5 times

✉️  **AP2020**  7 months, 1 week ago

**Selected Answer: D**

Correct

   upvoted 1 times

✉️  **ceejaybee** 1 year, 2 months ago

**Selected Answer: D**

In exam, Jun-22

   upvoted 1 times

✉️  **Rachha** 3 years, 2 months ago

the lowest needed to sell the product

   upvoted 2 times

✉️  **Preety** 3 years, 6 months ago

in exam

   upvoted 4 times

## Question 21

You work in a sales role for an organization that uses Dynamics 365. You are managing an opportunity for a potential customer.

You need to create a quote that automatically includes all the products from the opportunity.

What should you do?

- A. Convert the opportunity to a quote
- B. Create a new quote from the customer
- C. Create a new quote from the opportunity
- D. Create a new quote with the opportunity price list

ET User: C

✉ **Urvin** 4 years, 4 months ago

Correct answer should be C

upvoted 64 times

✉ **Dean0918** 2 years, 5 months ago

Agree with C

upvoted 2 times

✉ **Benjamin** 3 years, 10 months ago

There is no button on an Opportunity called Convert to Quote. There is in the Quote section a button called "New Quote" this will create a new quote that automatically has the same price list and lines that were on the opportunity. So, the answer is C.

upvoted 21 times

✉ **Ghalandor90** 1 week, 6 days ago

**Selected Answer: C**

answer is s

upvoted 1 times

✉ **digitalyash86** 1 month, 3 weeks ago

A Vs C:

I would like to go with C because:

Even if you don't consider misleading term "Converting", They have specifically given C (creating quote from Opp record) which a correct way. C is definitely Correct, you can not miss to select it and A you can not really select bcoz in the answer you need to select only one option, not two.

upvoted 1 times

✉ **Radoslavov** 2 months, 4 weeks ago

**Selected Answer: C**

Its obvious it is C, but i'm wondering what kind of CRM is referred to in the "correct answer"?

upvoted 2 times

✉ **JudT** 5 months, 3 weeks ago

**Selected Answer: C**

C is correct

upvoted 1 times

✉ **19RPJY** 5 months, 3 weeks ago

**Selected Answer: C**

To create a quote, you must be in Opportunity and select "New Quote" under the Quotes Tab.

<https://learn.microsoft.com/en-us/dynamics365/sales/create-edit-quote-sales>

upvoted 1 times

Exam MB-210 topic 2 question 24 discussion - ExamTopics

ET Answer: A

<https://docs.microsoft.com/en-us/dynamics365/customer-engagement/developer/convert-opportunity-quote-sales-order-invoice>

Bing:

To create a quote that automatically includes all the products from the opportunity, you should **Create a new quote from the opportunity**. This can be done by selecting the site map, then selecting Opportunities. Select the opportunity you want to create a quote for, go to the Quotes tab and then select New Quote. The quote form opens and is prefilled with important details from the opportunity record <sup>1</sup>. So, the correct answer is **C. Create a new quote from the opportunity**.

## Question 22

A company uses Dynamics 365 for Sales.  
You need to change the description field on the quote.  
Which state allows you to make the change?  
A. Closed  
B. Active  
C. Draft  
D. Won

Answer: C

✉️  **Subodh** Highly Voted 3 years, 7 months ago

Correct answer

   upvoted 13 times

✉️  **Kratinhos** Most Recent 1 year, 3 months ago

On exam 27/4/22. Passed. I selected same answer

   upvoted 1 times

✉️  **yp** 2 years, 6 months ago

'Draft' option seems obvious

   upvoted 2 times

✉️  **Rachha** 3 years, 2 months ago

Draft is correct ans

   upvoted 2 times

✉️  **Preety** 3 years, 6 months ago

Correct

   upvoted 4 times

## Question 23

HOTSPOT -

A customer places an order that includes all of the products from a previous order. You plan to add products from the previous order to the new order.

From where can you retrieve the list of products? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

### Answer Area

	Source entity	Retrieve products from:
Quote		<div style="border: 1px solid black; padding: 5px;"><input type="checkbox"/> Lead <input type="checkbox"/> Opportunity <input type="checkbox"/> Quote <input type="checkbox"/> Order</div>
Order		<div style="border: 1px solid black; padding: 5px;"><input type="checkbox"/> Lead <input type="checkbox"/> Opportunity <input type="checkbox"/> Quote <input type="checkbox"/> Order</div>
Invoice		<div style="border: 1px solid black; padding: 5px;"><input type="checkbox"/> Lead <input type="checkbox"/> Opportunity <input type="checkbox"/> Quote <input type="checkbox"/> Order</div>

ET User: 点赞最多的如下，但我感觉 ET 给的是正确的，只是纯感觉

"Opportunity" for all

<https://learn.microsoft.com/en-us/dynamics365/sales/add-products-qoi-enhanced>

<https://docs.microsoft.com/en-us/dynamics365/sales/add-product-quote-order-invoice>

 **Joana** Highly Voted  1 year, 5 months ago

Tested it and, if we are retrieving the products by the command bar button "Get Products" then the answer is "Opportunity" for all 3. If it's by creating a new record, then I would say the given answers are correct.

   upvoted 9 times

 **mazen111** Highly Voted  1 year, 5 months ago

STEP ONE: create QUOTE "get product from previous opportunity"  
STEP TWO: Create ORDER ( automatically gets its products from the "QUOTE" )  
STEP THREE: Create INVOICE (automatically gets its products from the "ORDER")  
i feel its correct

   upvoted 6 times

✉ **digitalyash86** Most Recent 1 month, 3 weeks ago

I feel the answer is correct and would not be appropriate to use "get Products" for Order and Invoice (should only be used on Quote entity to get products from prev order's Opportunity) as:  
Question only talks about adding product from prev order, but after that there might be price, qty and discount changes required, which if done at Quote level, same needs to be carried forwarded to Order and Invoice (which might be additional effort if directly adding products on Order and Invoice level).

upvoted 1 times

✉ **Dotz** 6 months, 2 weeks ago

Given answers are correct. Tested this.  
 upvoted 1 times

✉ **Ram\_Has** 8 months, 1 week ago

Opportunity for all three options.

On this link > [<< it says: "The process of adding a product to a quote is the same as adding a product to an order or an invoice. This procedure explains how to add products to a quote."](https://learn.microsoft.com/en-us/dynamics365/sales/add-products-qoi-enhanced)

upvoted 1 times

✉ **Gosainsnehal** 1 year, 3 months ago

Opportunity for all 3.  
Tested on all 3 Quotes, Orders, and Invoices. Get products from a previously created opportunity. Underneath it, there is only an Opportunity available.

upvoted 3 times

✉ **VesperKiw** 1 year, 6 months ago

I find myself leaning towards Opportunity for all 3 as well based off <https://docs.microsoft.com/en-us/dynamics365/sales/add-product-quote-order-invoice>  
"The process for adding a product to a quote record is the same as adding a product to an order or an invoice."  
followed by  
"To add products from an opportunity, select the More commands button > Get products and select the opportunity.  
Products from the selected opportunity are added to the quote."  
I see no mention of anything other than opportunity in terms of this method to add products from a related record. Unfortunately I do not currently have quick access to an environment to validate this.

upvoted 2 times

✉ **sinjan** 1 year, 10 months ago

Supposing there was an opportunity for the previous order, you can create new quote, order, or invoice, click 'get product', and pick products from that opportunity  
 upvoted 4 times

✉ **skhan53** 2 years, 1 month ago

No it isn't, the Products are fetched from the Opportunities for all of them  
 upvoted 4 times

✉ **Cyrihars** 2 years ago

Can you please provide some proof?

upvoted 1 times

✉ **Cyrihars** 2 years ago

Because given the description of the question we have, it can be really the simplest logical answer with the sales process sequence. And since we are creating Order from a Quote, and an Invoice from an Order then (as for a user) it looks like I retrieve products from the screen where I'm creating the next record and from this perspective the given answers are looking correct.

upvoted 1 times

✉ **yakusacian** 1 year, 9 months ago

The questions clearly says the user get records from previous order not the same flow.  
i guess answer for all 3 is Opportunity  
 upvoted 3 times

✉ **Cyrihars** 2 years, 1 month ago

Seems correct.

upvoted 3 times

ET Answer:

### Answer Area

#### Source entity      Retrieve products from:

Quote

Lead
Opportunity
Quote
Order

Order

Lead
Opportunity
Quote
Order

Invoice

Lead
Opportunity
Quote
Order

## Question 24

HOTSPOT -

You use Dynamics 365 Sales.

You need to add products to an invoice.

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

NOTE: Each correct selection is worth one point.

Hot Area:

### Answer Area

Scenario	Option
Add a product from an opportunity.	<div style="border: 1px solid black; padding: 5px;"><input type="checkbox"/> Existing Product <input type="checkbox"/> Write-In Product <input type="checkbox"/> Get Products</div>
Add a product from a price list.	<div style="border: 1px solid black; padding: 5px;"><input type="checkbox"/> Existing Product <input type="checkbox"/> Write-In Product <input type="checkbox"/> Get Products</div>
Add a product that does not exist in the product catalog.	<div style="border: 1px solid black; padding: 5px;"><input type="checkbox"/> Existing Product <input type="checkbox"/> Write-In Product <input type="checkbox"/> Get Products</div>

Answer:

### Answer Area

Scenario	Option
Add a product from an opportunity.	<div style="border: 1px solid black; padding: 5px;"><input checked="" type="checkbox"/> Existing Product <input checked="" type="checkbox"/> Write-In Product <input checked="" type="checkbox"/> Get Products</div>
Add a product from a price list.	<div style="border: 1px solid black; padding: 5px;"><input checked="" type="checkbox"/> Existing Product <input type="checkbox"/> Write-In Product <input type="checkbox"/> Get Products</div>
Add a product that does not exist in the product catalog.	<div style="border: 1px solid black; padding: 5px;"><input type="checkbox"/> Existing Product <input checked="" type="checkbox"/> Write-In Product <input type="checkbox"/> Get Products</div>

## Question 25

HOTSPOT -

You use Dynamics 365 for Sales system customizer.

You need to create product kits and bundles.

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

NOTE: Each correct selection is worth one point.

Hot Area:

## Answer Area

Requirement	Option
View individual products in a grouping when you create an opportunity.	<input type="checkbox"/> Kit <input type="checkbox"/> Bundle
Sell products from a grouping individually.	<input type="checkbox"/> Kit <input type="checkbox"/> Bundle
Create a grouping within a grouping.	<input type="checkbox"/> Kit <input type="checkbox"/> Bundle

Answer: 注，最新的选项 Kit 可能改成了 Product Family，找到了 Q34

## Answer Area

Requirement	Option
View individual products in a grouping when you create an opportunity.	<input type="checkbox"/> Kit <input checked="" type="checkbox"/> Bundle
Sell products from a grouping individually.	<input type="checkbox"/> Kit <input checked="" type="checkbox"/> Bundle
Create a grouping within a grouping.	<input checked="" type="checkbox"/> Kit <input type="checkbox"/> Bundle

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

<https://docs.microsoft.com/en-us/dynamics365/customerengagement/on-premises/developer/create-manage-product-families-products-bundles-product-properties#differences-between-kits-and-bundles>

- ✉  **avow**  2 years, 7 months ago  
A good link explaining the differences between kits and bundles: <https://docs.microsoft.com/en-us/dynamics365/customerengagement/on-premises/developer/create-manage-product-families-products-bundles-product-properties#differences-between-kits-and-bundles>  
   upvoted 22 times
- ✉  **Hmelin23**  2 years, 3 months ago  
On the exam 12.04.2021 there was this question, but instead of kit there was the option "products family".  
   upvoted 12 times
- ✉  **Gosaisnehal**  1 year, 3 months ago  
I can't see Kit anymore in D365 Sales, correct me if wrong. Probably replaced by product family.  
In that case, 1. Bundle, 2. Product family and 3. Product family.  
   upvoted 3 times
- ✉  **SashM** 1 year, 4 months ago  
Correct answer  
Kits Bundles  
All the products in a kit are mandatory. Some products in a bundle can be optional.  
Kits support nesting; you can add a kit to another kit. You can't add a bundle to another bundle. You can only add products to a bundle.  
   upvoted 2 times
- ✉  **Cyriharsh** 2 years ago  
1. Bundle -- looks like product, but contains some grouping.  
2. Family -- I can have the logical grouping and sell products individually. Why should I create any bundles if I sell products individually?  
3. Family -- supports nesting.  
   upvoted 2 times
- ✉  **lakshmig** 2 years, 1 month ago  
1.-- BUNDLE(can add only prod to bundle)  
2. Bundle(prod in bundle are optional; can see both bundle and prod level details)  
3. KIT/PROD FAMILY(all prods in a kit are mandatory; kits support nesting;you can only see kit level details not ind. prod)  
   upvoted 5 times
- ✉  **lakshmig** 2 years, 1 month ago  
1.-- BUNDLE(can add only prod to bundle)  
2. Bundle(prod in bundle are optional; can see both bundle and prod level details)  
3. KIT/PROD FAMILY(all prods in a kit are mandatory; kits support nesting;you can only see kit level details not ind. prod)  
   upvoted 2 times
- ✉  **yp** 2 years, 6 months ago  
Correct answer. Kits support nesting structures, therefore, 3rd Q = Kit. Follow the link above  
   upvoted 2 times
- ✉  **BenJames** 2 years, 9 months ago  
Correct  
   upvoted 3 times

## Question 26

You are a salesperson using Dynamics 365 Sales.

You need to revise an active quote.

What happens to the original quote record?

- A. The quote is deleted
- B. The quote is converted into an order and a copy of the quote is put in draft mode for modification
- C. The quote is put in draft mode for modification.
- D. The quote is closed, and a copy of the quote is put in draft mode for modification

ET User: D

### [Exam MB-210 topic 2 question 30 discussion - ExamTopics](#)

✉ **lilclash** 4 years ago

the correct answer is D

upvoted 71 times

✉ **Dean0918** 2 years, 5 months ago

the correct answer is D

upvoted 8 times

✉ **LucaV6** 3 years, 10 months ago

confirm the correct answer is D

upvoted 20 times

✉ **Sickkgb** 1 month, 3 weeks ago

**Selected Answer: D**

If you must make changes to an activated quote, select Revise quote. The quote is closed, and the revised reason code is used. A new quote is then created that has the same ID and an incremented revision number. All the details from the original quote are copied to the new quote. The new quote is in draft status and can be edited as required.

upvoted 1 times

✉ **inka11** 2 months, 3 weeks ago

**Selected Answer: D**

D it is

upvoted 1 times

✉ **No\_Doubt** 5 months, 2 weeks ago

**Selected Answer: D**

D without any doubt

upvoted 1 times

ET Answer: C

Bing:

If you need to revise an active quote in Dynamics 365 Sales, the original quote will be closed, and a copy of the quote will be put in draft mode for modification <sup>1</sup>. This means that when you select "Revise quote" on an activated quote, the quote is closed, and the revised reason code is used. A new quote is then created that has the same ID and an incremented revision number. All the details from the original quote are copied to the new quote. The new quote is in draft status and can be edited as required <sup>1</sup>. So, the correct answer is **D. The quote is closed, and a copy of the quote is put in draft mode for modification.**

## Question 27

DRAG DROP -

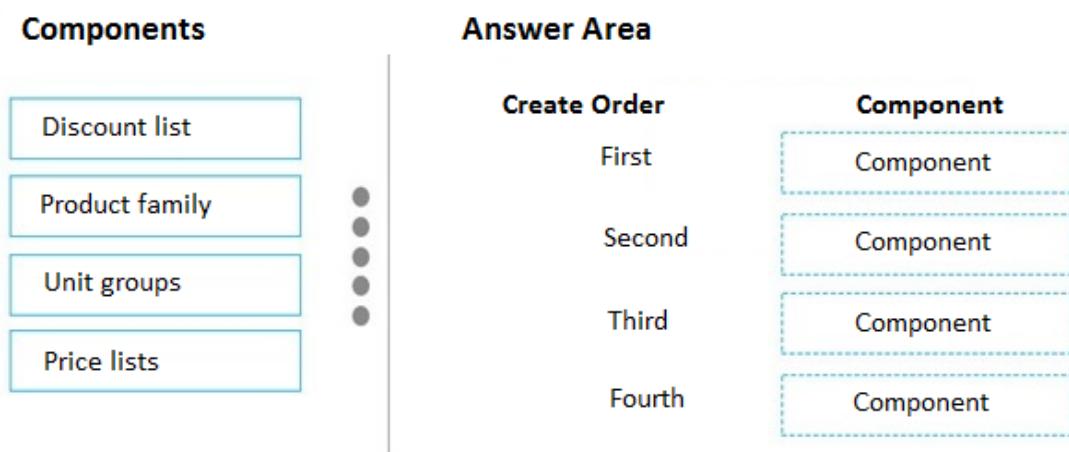
You are setting up a product catalog in Dynamics 365 Sales.

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

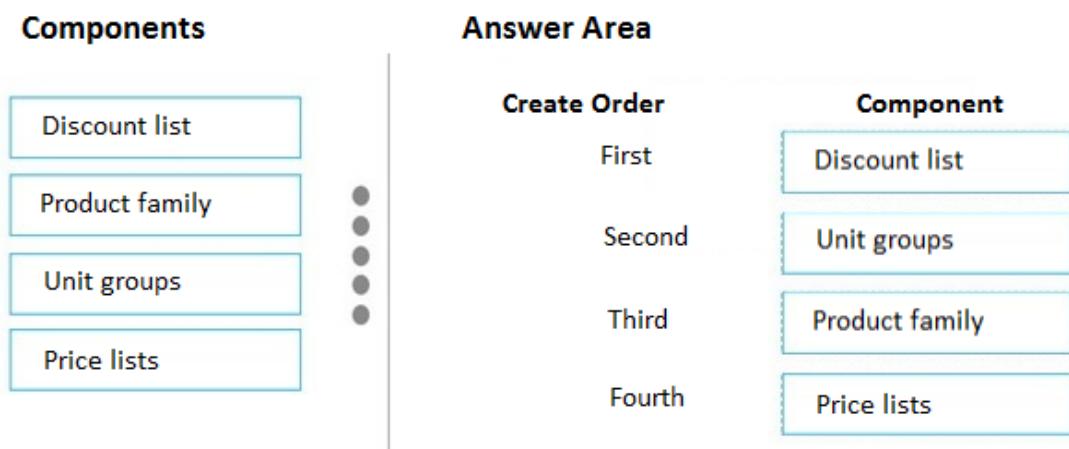
In which order should you set up the catalog? To answer, drag the appropriate components to the correct order position. Each component may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

Select and Place:



Answer:



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

<https://docs.microsoft.com/en-us/learn/modules/manage-organize-product-catalog-dynamics-365-sales/1-product-catalog-overview>

- ✉ **BenJames** Highly Voted 2 years, 9 months ago  
Correct <https://docs.microsoft.com/en-us/learn/modules/manage-organize-product-catalog-dynamics-365-sales/media/pc-unit1-1.png>  
Upvote 24 times
- ✉ **anthony** Highly Voted 2 years, 8 months ago  
Answer is correct.  
  
Please see here on the official microsoft documentation:  
<https://docs.microsoft.com/en-us/learn/modules/manage-organize-product-catalog-dynamics-365-sales/1-product-catalog-overview>
- Upvote 11 times
- ✉ **anthony** 2 years, 8 months ago  
The question clearly states 'least amount of effort'. Even though discount lists are not required, starting with the discount list is the least amount of effort according to microsoft and hence the answer is correct.  
Upvote 3 times
- ✉ **digitalyash86** Most Recent 1 month, 3 weeks ago  
Discount List to be created first, not because it makes any difference, just because someone in microsoft said so in his/her article. amazing  
Upvote 3 times
- ✉ **SashM** 1 year, 4 months ago  
Correct answer  
Upvote 1 times
- ✉ **lakshmig** 2 years, 1 month ago  
discount list comes first , even though it may not be used all the time. hence the answer given above is right  
Upvote 1 times
- ✉ **richardQA** 2 years, 2 months ago  
that's truth  
Upvote 1 times
- ✉ **Dean0918** 2 years, 5 months ago  
answer is correct.  
Upvote 1 times
- ✉ **yp** 2 years, 6 months ago  
Upvoting the answer provided  
Upvote 3 times
- ✉ **IhateThisNickname** 2 years, 9 months ago  
Answer is correct  
Upvote 5 times
- ✉ **dmlstd** 2 years, 9 months ago  
Unit group - Product family - Discount - Price List  
You just need to try in CRM, not guess or search on internet some incomplete creation schema.  
Upvote 1 times
- ✉ **zzecevic** 2 years, 9 months ago  
Unit groups - Product Family - Price List - Discount Price List  
Upvote 6 times

## Question 28

DRAG DROP -

A company uses Dynamics 365 Sales to manage sales orders.

You need to create an order for a new customer.

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

Select and Place:

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

Answer: 争议

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

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

- ✉️ **Zeus6** 2 years, 9 months ago  
I hope the exam board allow 'adding the products' and 'adding shipping/address details' to both be 3rd or 4th as it really doesn't matter which order you enter these, as you can add the shipping/address details before adding the products...  
 upvoted 13 times
- ✉️ **KevH** 2 years, 9 months ago  
Agreed. Just done it  
 upvoted 3 times
- ✉️ **avow** 2 years, 7 months ago  
Even more so, what if location defines what warehouse items needs to be shipped from? Why would you not want complete customer details before starting an order? Makes more sense to me to have shipping info first.  
 upvoted 5 times
- ✉️ **alexixy** 1 year, 2 months ago  
1. Create a new customer account  
2. Create a new order for the customer  
3. Add customer address and shipping information - on this step you need to save the order to have the chance to "Add products from inventory"  
4. Add products form inventory  
5. Pick items and ship order  
 upvoted 9 times
- ✉️ **yp** 2 years, 6 months ago  
Provided solution is correct with 1. Customer acct, 2. New order, 3. Add products, 4. Address and shipping info, 5. Fulfillment sequence match typical distribution scenario. Functionally no matter if 3 and 4 swapped, but process-wise shipping info added/verified last right before to creating shipping label and acknowledgment that order is shipped.  
 upvoted 6 times

Bing:

To create an order for a new customer in Dynamics 365 Sales, you should perform the following actions in this order:

1. **Create a new customer account in Dynamics 365 for Sales:** First, you need to create a new customer account in Dynamics 365 for Sales [1](#).
2. **Add customer address and shipping information:** After creating the customer account, you need to add the customer's address and shipping information [1](#).
3. **Create a new order for the customer:** Once the customer account is set up, you can create a new sales order for the customer [1](#).
4. **Add products from inventory for the sale:** After creating the sales order, you can add products from your inventory to the sales order [1](#).
5. **Pick items and ship order:** Finally, you can pick the items from your inventory and ship the order to the customer [1](#).

So, the correct order is: Create a new customer account in Dynamics 365 for Sales, Add customer address and shipping information, Create a new order for the customer, Add products from inventory for the sale, Pick items and ship order.

## Question 29

A company uses Dynamics 365 Sales to create and manage opportunities, quotes and orders.

You need to ensure that the Actual Revenue field in an opportunity is automatically updated with the total amount from the quote.

What should you do?

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

ET User: A/B/C

**B (57%)**      **A (43%)**

<https://carldesouza.com/opportunities-calculating-revenue-dynamics-365/>

✉️ MireiaRC Highly Voted 2 years, 9 months ago

I think correct answer is A. You cannot convert a Quote to an Order, you can create the quote FROM the Order, but still link is the most appropriate answer, as explained in:  
<https://carldesouza.com/opportunities-calculating-revenue-dynamics-365/>

👍 ↗️ 🎉 upvoted 25 times

✉️ KeyH 2 years, 9 months ago

Yes. But when you "Close as Won" the dialog box has a required field for Actual revenue, So I will stick with B

👍 ↗️ 🎉 upvoted 5 times

✉️ chaxta 2 years, 6 months ago

The question states (auto populate). Closing as 'won' prompts you to manually enter the amount. I'm going with A

👍 ↗️ 🎉 upvoted 2 times

✉️ Ross22 2 years, 2 months ago

It will prompt you to manually enter the amount if required, else it will auto populate with the Actual Amount with Actual Revenue.

"In Actual Revenue, Verify the amount, and make changes, if NECESSARY."

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

👍 ↗️ 🎉 upvoted 2 times

✉️ digitalyash86 1 month, 3 weeks ago

Read this line again "You need to ensure that the Actual Revenue field in an opportunity is automatically updated with the total amount from the quote.". Clearly says, from Quote

👍 ↗️ 🎉 upvoted 1 times

✉️ MarkHelou Highly Voted 2 years, 8 months ago

A is correct, once you create the order you specify if you want the revenue to be calculated from quote or not

👍 ↗️ 🎉 upvoted 15 times

✉️ digitalyash86 Most Recent 1 month, 3 weeks ago

**Selected Answer: A**

A is the correct answer as "You need to ensure that the Actual Revenue field in an opportunity is <<<automatically>>> updated with the total amount <<<from the quote>>>."

👍 ↗️ 🎉 upvoted 1 times

- ✉  **JudT** 5 months, 3 weeks ago  
Selected Answer: B  
It's about an Opty so 100% B  
   upvoted 1 times
- ✉  **d365ppp** 1 year, 1 month ago  
Selected Answer: B  
B: Coz the question is about the opportunity. If you are converting quote into Order directly. Then this pop up will open with 4 options. There is only one option if you work from the opp window. Close as won. If opp is open and you are entering directly from the quote screen and creating order then the screen will ask you if you want to close the oppo and calculate .  
   upvoted 3 times
- ✉  **Gosaisnehal** 1 year, 3 months ago  
A. Convert the quote to an order. Set the value of the Calculate actual revenue from quotes option to Yes.  
VERY THOROUGHLY TESTED- OPPORTUNITY CLOSED AS WON, WILL ONLY GET THE ACTUAL VALUE FROM THE PRODUCTS ADDED TO THE OPPORTUNITY IF SYSTEM CALCULATED SELECTED. WHILE, WE COULD HAVE DIFFERENT QUOTE FROM OPPORTUNITY AND CREATING ONE ORDER FROM THE QUOTE  
   upvoted 1 times
- ✉  **Caax** 1 year, 5 months ago  
Selected Answer: A  
Answer A  
   upvoted 1 times
- ✉  **Joana** 1 year, 5 months ago  
Selected Answer: A  
Just tested and, although you don't convert a Quote to an Order (you just create a new Order) the part of "Calculate actual revenue from quotes" is true. So I'd go with A.  
   upvoted 1 times
- ✉  **AndreaDP** 1 year, 7 months ago  
Reading the question seems to me that it is about the opportunity actual revenue to be set. This happens when you open an order from a quote (create order in the command bar) and set the flag "close opportunity" to yes. This option immediately closes the opportunity as won and makes the same on the quote, while sets the revenue of the opportunity equal to the amount in the quote.  
   upvoted 1 times
- ✉  **AndreaDP** 1 year, 7 months ago  
So should be C  
   upvoted 1 times
- ✉  **lummi** 1 year, 11 months ago  
tested! its a  
   upvoted 2 times
- ✉  **Cyriharsh** 2 years ago  
Tested in Sales Hub and it's A - creating an Order from a Quote allowed to do the required action.  
   upvoted 2 times
- ✉  **HassanSarhan** 1 year, 12 months ago  
Good thanks  
   upvoted 1 times
- ✉  **T\_G\_1** 2 years, 2 months ago  
A is correct, am an active user  
   upvoted 3 times
- ✉  **aish** 2 years, 3 months ago  
on closing the opportunity as won actual amount on opportunity is updated with total amount of quote.  
   upvoted 2 times
- ✉  **Dean0918** 2 years, 5 months ago  
A is correct . Tested in Trial.  
when create an order from quote, the two steps should be done:  
1. Close Opportunity option to Yes  
2. Set the value of the Calculate actual revenue from quotes option to Yes.  
then it will be ok.  
   upvoted 5 times
- ✉  **Dean0918** 2 years, 5 months ago  
after this, checked the actual revenue of the opportunity, and it was calculated according to the quote  
   upvoted 1 times
- ✉  **sk\_cert** 2 years, 5 months ago  
Activate Quote, use "Create Order" button, select Yes for "Calculate actual revenue from quotes" option.  
Answer is A.  
   upvoted 1 times

**Saketk** 2 years, 8 months ago

A is correct, when we do create an order, the popup shows close opp as won = yes and option to calculate total revenue from the quote as yes/no  
 upvoted 4 times

**CRM504559** 2 years, 9 months ago

Answer is C, Just tested it, when you create an quote in your opportunity and then activate it, you get the option to create a order, when you click this and set 'close opportunity' to yes, you have to either let the revenue be calculated from the quote, or set the value yourself.  
 upvoted 7 times

ET Answer: B

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

Bing:

To ensure that the Actual Revenue field in an opportunity is automatically updated with the total amount from the quote, you should **Convert the quote to an order**. When you convert the quote to an order, a window will pop up with options to close the opportunity at the same time and calculate the revenue from quotes <sup>1</sup>. You should set the value of the **Calculate actual revenue from quotes** option to **Yes** <sup>1</sup>. This will update the Actual Revenue field in the opportunity with the total amount from the quote <sup>1</sup>. So, the correct answer is A. **Convert the quote to an order. Set the value of the Calculate actual revenue from quotes option to Yes.**

## Question 30

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

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

You need to modify the quote template.

What should you use?

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

Answer: C

<https://community.dynamics.com/business/f/dynamics-365-business-central-forum/286153/edit-quote-template?pifragment=96728=1>

<https://neilparkhurst.com/2019/07/07/mb-210-microsoft-dynamics-365-for-sales-word-templates/>

✉  **errewan** Highly Voted 2 years, 7 months ago

Correct.

Reference: <https://community.dynamics.com/business/f/dynamics-365-business-central-forum/286153/edit-quote-template?pifragment=96728=1>

   upvoted 6 times

✉  **ceejaybee** Most Recent 1 year, 2 months ago

Selected Answer: C

In exam, Jun-22

   upvoted 1 times

✉  **Kratinhos** 1 year, 3 months ago

On exam 27/4/22. Passed. I selected same answer

   upvoted 1 times

✉  **Kyol** 1 year, 7 months ago

So poorly worded.

   upvoted 4 times

✉  **StefmanIT65** 2 years, 8 months ago

Reference: <https://neilparkhurst.com/2019/07/07/mb-210-microsoft-dynamics-365-for-sales-word-templates/>

   upvoted 3 times

✉  **HassanSarhan** 1 year, 12 months ago

Good link explanation thanks

   upvoted 1 times

## Question 31

You are a system customizer in Dynamics 365 Sales.

You need to set up product families.

Which option is available?

- A. Create a maximum of 10 child product families
- B. Set a product bundle as a parent of a product family
- C. Add the product to multiple product families
- D. Set a product property as an option set

Answer: D

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

✉️  **dmlstd**  2 years, 9 months ago

By eliminating A, B and C, the only one left is D. The problem is that I cannot see the logic.  
So I would say that the answer is correct.

   upvoted 13 times

✉️  **yp**  2 years, 6 months ago

Voting up D as the only one matching D365 CE logic

   upvoted 2 times

✉️  **mekoye7752** 2 years, 7 months ago

C, because: 'You need to set up product families', create one or more families and associate one or more product to it.

   upvoted 1 times

✉️  **MiguelNepomuceno** 2 years, 1 month ago

Based on the docs, product can only have 1 parent product (be a family or a product).

   upvoted 1 times

Bing:

As a system customizer in Dynamics 365 Sales, when setting up product families, you have the option to **Set a product property as an option set**. A product family lets you group and categorize products, making it easier for you to manage them. With product families, you can categorize your products in whichever way is most meaningful to your organization and create child products and product bundles within a product family <sup>1</sup>. You can also create as many levels of product families as you want by creating a family within a family <sup>1</sup>. So, the correct answer is D. **Set a product property as an option set**.

## Question 32

A company uses Dynamics 365 Sales.

You attempt to add a product to an order, but the product cannot be located.

You need to determine why the product is missing.

What is the cause?

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

Answer: A

✉️  **MarkHelou**  2 years, 8 months ago

Correct

   upvoted 9 times

✉️  **lakshmig**  2 years, 1 month ago

A must be right.

"open the product, bundle, or family you want to publish, and on the command bar, select Publish. This will change the product status to Active and make it available for selling."

   upvoted 5 times

✉️  **yp**  2 years, 6 months ago

Correct

   upvoted 3 times

Bing:

If you attempt to add a product to an order in Dynamics 365 Sales, but the product cannot be located, it could be because the product is not published. When a price list is selected for the opportunity, the products listed in the Existing Product field are filtered by the price list. This means that only the products associated with the selected price list are shown in this field [1](#). If a price list is selected, and you select a product that isn't associated with the price list, you'll see an error. You should select a product that's associated with the selected price list [1](#). So, the correct answer is **A. The product was not published**. Is there anything else I can help with? 😊

## Question 33

You are a Dynamics 365 Sales administrator for an organization.

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

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

What should you do?

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

Answer: A

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

✉️  **MarkHelou**  2 years, 8 months ago

Correct

   upvoted 6 times

✉️  **yp**  2 years, 6 months ago

Correct

   upvoted 5 times

✉️  **yp**  2 years, 6 months ago

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

   upvoted 4 times

## Question 34

HOTSPOT -

You are a Dynamics 365 Sales system customizer.

You need to create Product Bundles and Product Families.

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

NOTE: Each correct selection is worth one point.

Hot Area:

### Answer Area

Requirement	Option
View individual products in a grouping when you create an opportunity.	<input type="checkbox"/> Product Family <input type="checkbox"/> Product Bundle
Sell products from a grouping individually.	<input type="checkbox"/> Product Family <input checked="" type="checkbox"/> Product Bundle
Create a grouping within a grouping.	<input type="checkbox"/> Product Family <input checked="" type="checkbox"/> Product Bundle

ET User:

Product Bundle - Product Bundle - Product Family

BenJames Highly Voted 2 years, 9 months ago

Would the first not be a product bundle?

upvoted 22 times

dynamicsdaddy 2 years, 8 months ago

Product Bundle - Product Bundle - Product Family

upvoted 27 times

qvex 2 years, 8 months ago

I second that. Bundles should be correct.

upvoted 2 times

yp Highly Voted 2 years, 6 months ago

Product Bundle - Product Bundle - Product Family: similar to one of previous questions in this paper (was Bundle-Bundle-Kit)

upvoted 12 times

- ✉ MARIANA123 Most Recent 11 months, 1 week ago  
 "A bundle is a collection of products that is sold as single unit." Therefore number 2 can't be bundle as they want to sell products from a grouping individually - has to be product family. Therefore the answer is:  
 Bundle - family - family  
 upvoted 2 times
- ✉ Ram\_Has 8 months, 2 weeks ago  
 The link supplied advises:  
 Here are some things to know about bundles: You can mark certain products in a bundle as optional and sell them individually.  
 So should be: Bundle - Bundle - Family  
 upvoted 2 times
- ✉ Cyrihars 2 years ago  
 Why the 2nd one is not a Family? Don't get why would I need a bundle to sell items individually))  
 upvoted 4 times
- ✉ loulou2105 1 year, 8 months ago  
 You actually can't add Product Families to an opportunity :)  
 upvoted 2 times
- ✉ wwwtmm 1 year, 5 months ago  
 I think too - 2nd one must be Family  
 upvoted 2 times
- ✉ SashM 1 year, 4 months ago  
 You can add individual product from bundle but for family you need to sell them as a group.  
 upvoted 1 times
- ✉ Jurka 1 year, 2 months ago  
 I think it's exactly the other way around. You put similar products in a product family and sell them individually. A bundle is like a product but it contains other products. A bundle is sold as a whole.  
 upvoted 4 times
- ✉ lakshmi 2 years, 1 month ago  
 1.bundle(allows to view bundle level and ind product level details, where as prod family /kit shows only kit level details),  
 2.bundle(allows ind prod sale from group) and  
 3. prod family/kit/prod family allows nesting)  
 upvoted 3 times
- ✉ Dean0918 2 years, 5 months ago  
 Bundle - Bundle - Family  
 upvoted 4 times
- ✉ sk\_cert 2 years, 5 months ago  
 Bundle - Bundle - Family  
 upvoted 4 times

ET Answer:

## Answer Area

### Requirement

### Option

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

Product Family
Product Bundle

Sell products from a grouping individually.

Product Family
Product Bundle

Create a grouping within a grouping.

Product Family
Product Bundle

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

## Question 35

A company sends PDF quotes to customers.

A salesperson wants to revise the look of a quote after selecting the Export to PDF button.

You need to modify the template for the PDF.

Where should you modify the template?

- A. Microsoft Excel
- B. a report
- C. Microsoft Word
- D. the PDF document

Answer: C

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

 luoboice 2 months ago

Correct

   upvoted 1 times

 abdullah\_alee 1 year, 6 months ago

C Correct

   upvoted 3 times

Bing:

The correct answer is **C. Microsoft Word**. The template for the PDF should be modified in Microsoft Word. This is because Microsoft Word is a word processing program that allows users to create and edit documents, including templates for PDFs. Once the template has been modified in Microsoft Word, it can be used to generate a new PDF with the revised look.

## Question 36

DRAG DROP -

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

You must set up the following promotions in the product catalog:

- ⇒ Customers receive a free bag of chips when they purchase one can of soda.
- ⇒ Soda has different prices based on whether customers buy a can, a six-pack, or a case.
- ⇒ Customers receive an additional 10 percent off a purchase of 10 cases of soda.

You need to set up the promotions.

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

NOTE: Each correct selection is worth one point.

Select and Place:

Features	Answer Area	Requirement	Feature
Unit group		Receive free chips with a soda purchase.	Feature
Discount list		Purchase a case of soda.	Feature
Product family			
Product bundle		Purchase 10 cases of soda.	Feature

Answer:

Features	Answer Area	Requirement	Feature
Unit group		Receive free chips with a soda purchase.	Product bundle
Discount list		Purchase a case of soda.	Unit group
Product family			
Product bundle		Purchase 10 cases of soda.	Discount list

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

✉  **buzhlach** 1 year, 5 months ago

Shouldn't 10 cases be also unit group?

   upvoted 1 times

✉  **svatko** 1 year, 2 months ago

No the question is:

Customers receive an additional 10 percent off a purchase of 10 cases of soda. So it is about Discount list

   upvoted 1 times

✉  **bitm100** 1 year, 8 months ago

Correct

   upvoted 4 times

✉  **loulou2105** 1 year, 8 months ago

Correct

   upvoted 3 times

## Question 37

HOTSPOT -

You are a Dynamics 365 Sales administrator. The sales team has questions about competitor tracking.

You need to provide answers to the questions from the sales team.

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

NOTE: Each correct selection is worth one point.

Hot Area:

### Answer Area

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

Answer:

### Answer Area

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

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

<https://docs.microsoft.com/en-us/dynamics365/customerengagement/on-premises/basics/sales-insights-reports?view=op-9-1>

✉ SashM **Highly Voted** 1 year, 5 months ago

The given answer are correct. because competitor field is closed when opportunity is open. it is only available when a opportunity is closed as lost.  
ref: <https://docs.microsoft.com/en-us/dynamics365/sales/close-opportunity-won-lost-sales>

👍👎FLAG upvoted 6 times

✉ LukasLu **Highly Voted** 1 year, 9 months ago

In the Opp record, it has a subgrid to fill in existing competitors. When closing an Opp as won/lost - it is not a record, it is a pop up to change status of the current Opp record.

So answers are:

Opportunity record.  
Competitor Win/Lost (it's OOB report for sales).

👍👎FLAG upvoted 5 times

✉ Newb007 1 week, 2 days ago

SEe the link provided in answer ... I know what you mean but the "close" record is acutally an activity record. (related record) . "When you close an opportunity record, all the information that you enter is available in the associated Opportunity Close record. To see the associated Opportunity Close records, on the Related tab, select Activities. Then, on the Activities tab, open the Closed Activity Associated View."

👍👎FLAG upvoted 1 times

✉ loulou2105 1 year, 8 months ago

We are speaking about a WINNING competitor, so the opportunity is about to be closed.

So Opportunity close record

👍👎FLAG upvoted 5 times

✉ MARIANA123 **Most Recent** 11 months, 1 week ago

Answer is correct

👍👎FLAG upvoted 1 times

 **cpx97** 1 year, 4 months ago

Must be competitor win/loss report.

<https://docs.microsoft.com/en-us/dynamics365/customerengagement/on-premises/basics/sales-insights-reports?view=op-9-1>

Competitor win/loss record:

"Use this report to compare how your sales team performs against your competitors"

Sales history report:

"Use this report to see how your sales reps have performed and how much revenue they have generated for your business"

Sales history report provides information on how many sales the sales reps have closed (either won or lost) but it doesn't compare the performance against competitors

   upvoted 1 times

 **GaneshChowhan400** 1 year, 11 months ago

1 should be Opportunity record. Because when we close a Opp as Won, on Close opp form Competitor is locked.

   upvoted 2 times

 **hxwinchester** 1 year, 11 months ago

"Opportunity Close record" >> i think this means the pop-up when you close the opportunity? Where u specify the status (Won/Loss) then you add the competitor?

   upvoted 4 times

 **lummi** 1 year, 11 months ago

absolutely

   upvoted 2 times

## Question 38

HOTSPOT -

A salesperson must complete an opportunity by verifying the existing products and adding a new product from the product list. The product list has standard pricing. The salesperson observes the following issues with the products:

- ☞ The price per unit for each item in the product list is \$0.00.
- ☞ Some of the existing product lines use a default price and have an incorrect price per unit.

You need to complete the opportunity.

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
Add a price per unit to products.	<ul style="list-style-type: none"><li>Activate the product.</li><li>Add a price list to the product.</li><li>Add a price list to the opportunity.</li><li>Make the product a write-in product.</li></ul>
Correct prices for product lines.	<ul style="list-style-type: none"><li>Revise the product.</li><li>Activate the product.</li><li>Add a price list to the product.</li><li>Add a price list to the opportunity.</li></ul>

ET User:

1. Add Price list to Product

2. Add Price List to Opp

 **GaneshChowhan400**  1 year, 11 months ago

I think

1. Add Price list to Product
2. Add Price List to Opp

   upvoted 17 times

 **HassanSarhan** 1 year, 9 months ago

Agree with you

   upvoted 2 times

 **xoshi23** 1 year, 10 months ago

I think so too ...

   upvoted 1 times

 **JudT**  2 months, 1 week ago

Tested

First: Add a price list to product in App setting>Families and Products>Select Product>Additional Details> + New Price List Item>Add a price list to product and provide Pricing details

Second: Sales>oppo> Product >Add a Price list to oppo> select price for product line

   upvoted 1 times

 **No\_Doubt** 5 months, 2 weeks ago

The provided answer is correct!

- 1- The price per unit for "each item" in the product list is \$0.00. This means that the opportunity is missing a pricelist.
- 2- "Some of the existing product lines" use a default price and have an incorrect price per unit. This means that we need to add these "Some products" to the pricelist used in the related opportunity.

   upvoted 2 times

 **isuruudara** 5 months, 3 weeks ago

In the question it says the 'Sales Person' to add the prices. Therefore, can the sales person add price list to Product?

   upvoted 1 times

 **Gosaisnehal** 1 year, 3 months ago

1. Add Price list to Product

2. Add Price List to Opp

   upvoted 1 times

 **Kratinhos** 1 year, 3 months ago

On exam 27/4/22. Passed. I selected

Add price list to the product

Add a price list to the opportunity

   upvoted 3 times

 **qw1231** 1 year, 5 months ago

Agree with you

   upvoted 1 times

ET Answer:

#### **Answer Area**

##### **Requirement**

##### **Action**

Add a price per unit to products.

Activate the product.
Add a price list to the product.
Add a price list to the opportunity.
Make the product a write-in product.

Correct prices for product lines.

Revise the product.
Activate the product.
Add a price list to the product.
Add a price list to the opportunity.

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

## Question 39

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

Each product requires its own pricing structure.

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

How many price lists should you create?

- A. 1
- B. 3
- C. 10
- D. 30

ET User: 点赞 B 的多

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

✉ Ann\_Eke Highly Voted 1 year, 10 months ago

I think it's answer B: 3 pricelists. US, Mexico and UK = three different currencies  
You must create at least one price list for each of the currencies that your organization does business in.<sup>1</sup> <https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/create-price-lists-price-list-items-define-pricing-products>

1 upvoted 26 times

✉ AndreaDP Highly Voted 1 year, 7 months ago

I think it is answer B: 3 pricelists.  
One pricelist for each country. Then add 10 products as price list items to the 3 price lists. Each price list item embeds the specific pricing structure (as required). At the end you have 30 price list items and 3 price lists.

1 upvoted 10 times

✉ Candido Most Recent 2 months, 2 weeks ago

"Each product requires its own pricing structure" = 10  
3 country's -> currencies  
 $3 \times 10 = 30$   
It's a very tricky question

1 upvoted 1 times

✉ No\_Doubt 5 months, 2 weeks ago

Well this is a tricky one! But after thinking, the correct answer is B (3)

- We have 3 countries = 3 different currencies
- Even if each product has its own type like below  
TV, Water Dispenser, Washing Machine, AC ...  
The price list item entity is enough for each product to have its own pricing structure!

In other words, we only need 3 pricelists, with 10 pricelist items each.

1 upvoted 2 times

✉ isuruudara 5 months, 3 weeks ago

I think the answer given is correct. Answer is : B, because the question says that each product requires its own price list

1 upvoted 1 times

✉ isuruudara 5 months, 3 weeks ago

Sorry, the answer should be : C

1 upvoted 1 times

✉ MARIANA123 11 months, 1 week ago

Not sure if I am missing something but there are 3 Countries = 3 currencies = 3 Pricelists. There are 10 products and they each need their pricing structure, each product has a pricelist for each currency, so each product has 3 price lists therefore the total is 30.

Like Reply Upvoted 2 times

✉ EgycrmDev 1 year, 1 month ago

Selected Answer: B

The answer is B  
Like Reply Upvoted 1 times

✉ Possumus 1 year, 1 month ago

Selected Answer: B

If the pricing structure is the pricing method, so the correct answer is B. Because each pricing list can have item pricing list with different pricing methods.  
Like Reply Upvoted 1 times

✉ d365ppp 1 year, 1 month ago

Selected Answer: C

10 Pricelist. Question is trying to confuse  
Like Reply Upvoted 1 times

✉ AneeG 1 year, 4 months ago

3 as per currencies and product price structure for all 10 products you add in each of them.  
so you end up with 3 price lists and 30 price list items.

Like Reply Upvoted 1 times

✉ SilentMaize 1 year, 6 months ago

It is clearly written each product has its own pricing structure . Therefore each needs its own Price List. Therefore the answer is clearly 10.  
Like Reply Upvoted 1 times

Like Reply Upvoted 1 times

✉ mazen111 1 year, 5 months ago

by choosing 10 you ignore the Currencies.  
Like Reply Upvoted 1 times

✉ AndreaDP 1 year, 7 months ago

I see the price list object is associated to a currency and a list of price list items. Each of the 10 price list items can be defined to have a specific pricing structure (e.g. manually set, margin, cost base etc.). So with 3 price lists for the 3 country currencies would be sufficient to handle the 10 products. What do you think about it?  
Like Reply Upvoted 2 times

✉ AleMar153 1 year, 11 months ago

You're confusing price lists and price list items  
Like Reply Upvoted 2 times

✉ khu 1 year, 11 months ago

Correct you need 10 Pricelist and can link to any country you want as per need  
Like Reply Upvoted 2 times

✉ DJ26 1 year, 11 months ago

Wrong. The right answer is 30. 3 countries and each sells 10 products. Each product must have its own price list.  
Like Reply Upvoted 7 times

Like Reply Upvoted 7 times

✉ JoeS007 1 year, 8 months ago

However, the company only sells in USD. I think the answer is 10.  
Like Reply Upvoted 2 times

Like Reply Upvoted 2 times

✉ MissSam 1 year, 6 months ago

It doesn't say the company only sells in USD; the company default is USD. And, "You need to create price lists by using the local currency across countries and regions." It should be 30.  
Like Reply Upvoted 4 times

Like Reply Upvoted 4 times

✉ HassanSarhan 1 year, 9 months ago

I agree with you  
Like Reply Upvoted 2 times

Like Reply Upvoted 2 times

✉ yakusaclan 1 year, 9 months ago

the opportunity accepts one pricelist per opportunity. if you have 30 price list which one to add. the answer must be 10  
Like Reply Upvoted 1 times

Like Reply Upvoted 1 times

✉ yakusaclan 1 year, 9 months ago

i was wrong. we can change multiple price list every time when we add items to opportunity.  
Like Reply Upvoted 1 times

Like Reply Upvoted 1 times

ET Answer: C

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

Bing:

The correct answer is D. 30. Since the company does business in three countries (the United States, Mexico, and the United Kingdom) and sells 10 types of products, each with its own pricing structure, you should create a price list for each product in each country. This means you should create a total of 3 countries \* 10 products = 30 price lists. Each price list should use the local currency of the country it is intended for.

## Question 40

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

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

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

What should you update?

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

Answer: D

<https://docs.microsoft.com/en-us/dynamics365/customerengagement/on-premises/customize/define-rollup-fields?view=op-9-1>

<https://blog.magnetismsolutions.com/blog/satyvirjasra/2017/10/08/introduction-to-rollup-views-in-microsoft-dynamics-365>

<https://debajmecrm.com/all-you-want-to-know-about-rollup-view-entity-relationship-behavior-in-dynamics-365/>

✉ yakusclan **Highly Voted** 1 year, 9 months ago

<https://debajmecrm.com/all-you-want-to-know-about-rollup-view-entity-relationship-behavior-in-dynamics-365/>

Q1. What is rollup view relationship behavior?

Answer: Rollup relationship behavior allows activities of the related entity would show up in 'Activity Associated View' of the primary entity.

Q2. Can I have Rollup view relationship behavior for custom entities?

Answer: Yes, it is supported for custom entities.

👍 ↪ 📈 upvoted 7 times

✉ khu **Highly Voted** 1 year, 11 months ago

D is correct

👍 ↪ 📈 upvoted 5 times

✉ EgyermDev **Most Recent** 1 year, 1 month ago

**Selected Answer: C**

Add the new activity to the timeline subgrid on the account form

👍 ↪ 📈 upvoted 1 times

✉ No\_Doubt 5 months, 2 weeks ago

C isn't saying that btw!

👍 ↪ 📈 upvoted 1 times

✉ Khleos 1 year, 11 months ago

Answer is C

👍 ↪ 📈 upvoted 2 times

✉ JoeS007 1 year, 8 months ago

There is no field called "Timeline" on the Account form, nor in the Account entity. The given answer is correct.

👍 ↪ 📈 upvoted 2 times

Bing:

To allow event activities to appear in the account timeline, you should update the **Relationship Rollup View** in the relationship definition. The correct answer is **D. Relationship Rollup View in the relationship definition**. This will allow the account manager to see all activities related to accounts in the timeline, including those tracked against events.

## Question 41

You are updating a price list item in Dynamics 365 Sales.

You need to manually enter the price of a product for a price list item.

Which pricing method should you use?

- A. Percent of List
- B. Percent Markup - Current Cost
- C. Percent Margin - Standard Cost
- D. Currency Amount

Answer: D

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

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

✉️  **SashM** 1 year, 5 months ago

Correct answer:

"Currency Amount: Use this to ignore a product's list price in the product catalog and to enter a different price manually for this price list."

   upvoted 3 times

✉️  **zukito3** 1 year, 8 months ago

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

   upvoted 3 times

✉️  **GaneshChowhan400** 1 year, 11 months ago

Currency Amount

   upvoted 3 times

## Question 42

HOTSPOT -

A company uses Dynamics 365 Sales to manage sales orders.

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

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

NOTE: Each correct selection is worth one point.

Hot Area:

### Answer Area

Task	Stage
Create a lead.	<div style="border: 1px solid black; padding: 5px; width: fit-content;"><input type="checkbox"/> Qualify <input type="checkbox"/> Develop <input type="checkbox"/> Propose <input type="checkbox"/> Close</div>
Identify stakeholders.	<div style="border: 1px solid black; padding: 5px; width: fit-content;"><input type="checkbox"/> Qualify <input type="checkbox"/> Develop <input type="checkbox"/> Propose <input type="checkbox"/> Close</div>
Present the proposal.	<div style="border: 1px solid black; padding: 5px; width: fit-content;"><input type="checkbox"/> Qualify <input type="checkbox"/> Develop <input type="checkbox"/> Propose <input type="checkbox"/> Close</div>
Process orders.	<div style="border: 1px solid black; padding: 5px; width: fit-content;"><input type="checkbox"/> Qualify <input type="checkbox"/> Develop <input type="checkbox"/> Propose <input type="checkbox"/> Close</div>

Answer:

## Answer Area

Task	Stage
Create a lead.	<div style="border: 1px solid #ccc; padding: 5px; width: fit-content;"><div style="background-color: #90EE90; height: 15px; width: 100%;"></div><div>Qualify</div><div>Develop</div><div>Propose</div><div>Close</div></div>
Identify stakeholders.	<div style="border: 1px solid #ccc; padding: 5px; width: fit-content;"><div style="background-color: #90EE90; height: 15px; width: 100%;"></div><div>Qualify</div><div>Develop</div><div>Propose</div><div>Close</div></div>
Present the proposal.	<div style="border: 1px solid #ccc; padding: 5px; width: fit-content;"><div style="background-color: #90EE90; height: 15px; width: 100%;"></div><div>Qualify</div><div>Develop</div><div>Propose</div><div>Close</div></div>
Process orders.	<div style="border: 1px solid #ccc; padding: 5px; width: fit-content;"><div style="background-color: #90EE90; height: 15px; width: 100%;"></div><div>Qualify</div><div>Develop</div><div>Propose</div><div>Close</div></div>

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

✉ **EK1986** 1 year, 5 months ago

in exam 2/22

👍 🔍 ⚡ upvoted 3 times

✉ **loulou2105** 1 year, 8 months ago

Correct

👍 🔍 ⚡ upvoted 3 times

## Question 43

HOTSPOT -

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

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

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

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

NOTE: Each correct selection is worth one point.

Hot Area:

### Answer Area

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

ET User:

- 1) create red phone product
- 2) create a price list for the red telephone

 **Em1122** Highly Voted 1 year, 9 months ago

I think last question is B, no? Because D applies to all telephones, whereas B only applies to the red phone?  
   upvoted 10 times

 **SashM** Highly Voted 1 year, 5 months ago

1) create red phone product  
2) create a price list for the red telephone  
   upvoted 10 times

 **EgycrmDev** 1 year, 1 month ago

Totally agree  
   upvoted 1 times

 **christosp619** Most Recent 1 year, 6 months ago

Tested it.  
To edit 'color' property you have to Revise the product. So 1-c 1-d are a no.  
For the price list, you can't create a price list for the product property so no point on revising the current telephone product.  
The only option is to create a new product so 1-A is correct.  
For 2 because we created a new product, we must Create a new price list. So i think 2-B is correct.  
   upvoted 5 times

 **Candy2002** 10 months, 3 weeks ago

Yes, the question is tricky because the red phone has a special price in which we must separate it from original telephone. If we revise the telephone, there is no way for us to create a price difference between original telephone & red telephone. My answer will be 1-A. Follow up on 1-A, we will need a new price list item for red telephone. Then we will need 2-B.  
   upvoted 1 times

 **Tai001** 1 year, 6 months ago

I guess first question is 3 - override the properties. You can override the property and setup red color.  
   upvoted 1 times

 **Sabineka** 1 year, 9 months ago

1- Revise the product  
2-Create a new price list for the red telephone  
   upvoted 2 times

 **Sabineka** 1 year, 9 months ago

since the company has a list of telephone colors that customers can choose from, the red color should be a property that's why he has to revise the product  
   upvoted 1 times

**loulou2105** 1 year, 8 months ago

Not sure you can create a price list for a product property  
 upvoted 2 times

**Candy2002** 10 months, 3 weeks ago

Yes, there is no way to create a price list with property, thus, the answer only can be 1-A, 2-B  
 upvoted 1 times

ET Answer:

**Answer Area**

**Requirement**

Allow the sales team to select the red phone.

Create a red phone product.
Revise the telephone product.
Override the properties of the telephone.
Overwrite the properties of the telephone.

Allow the sales team to select special pricing for the red phone.

Create a price list item for the telephone.
Create a price list item for the red phone product.
Update the existing price list item for the telephone.
Update the telephone default price list to a price list that lasts one month.

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

## Question 44

A company deploys reporting for Dynamics 365 Sales.

You need to set up the Power BI content pack.

Which Power BI product should you use to customize the content pack reports?

- A. Power BI website
- B. Power BI Desktop
- C. Power BI Premium
- D. Power BI Professional

Answer: ABCD 都有人选，选 B 的多一丢丢, ET 给的 D, Bing 给的 B

<https://learnmsdynamics.com/blog/power-bi-sales-content-pack-in-microsoft-dynamics-365>

<https://docs.microsoft.com/en-us/power-bi/collaborate-share/service-organizational-content-pack-introduction>

<https://powerbi.microsoft.com/en-gb/power-bi-pro/>

<https://www.mssqltips.com/sqlservertip/4251/power-bi-enterprise-content-packs/>

回复 chloaus 2 weeks, 4 days ago

Answer is A. The question is asking about how to customize the content pack reports. See link below:  
<https://learnmsdynamics.com/blog/power-bi-sales-content-pack-in-microsoft-dynamics-365>

1 赞同 1 回复 1 评论 1 举报 1 次

回复 EgyCRMDev 12 months ago

Selected Answer: D

Correct. Power BI Professional

1 赞同 1 回复 1 评论 1 举报 1 次

回复 Possumus 1 year, 1 month ago

Selected Answer: B

The question is: Which Power BI "PRODUCT" should you use for customize...? PowerBI Professional is not a product is a type of license. The unique product in the options is PowerBI Desktop. PowerBI website is not a product, PowerBI service is.

1 赞同 1 回复 1 评论 1 举报 2 次

回复 SashM 1 year, 5 months ago

correct. power BI profession is listed as product.

ref: <https://powerbi.microsoft.com/en-gb/power-bi-pro/>

1 赞同 1 回复 1 评论 1 举报 3 次

回复 JoeS007 1 year, 8 months ago

I use PowerBI but never the content packs. However, I believe the given answer is correct. <https://www.mssqltips.com/sqlservertip/4251/power-bi-enterprise-content-packs/>

1 赞同 1 回复 1 评论 1 举报 2 次

回复 Ann\_Eke 1 year, 9 months ago

It's true that we need either the pro or premium version of Power BI to access the Power BI Content pack feature. But don't we need Power BI desktop to customize the reports?

1 赞同 1 回复 1 评论 1 举报 2 次

回复 yakusaclan 1 year, 9 months ago

they are not asking about the license type. they are asking about the product. the answer must be B as you suggested

1 赞同 1 回复 1 评论 1 举报 3 次

回复 mood186 1 year, 7 months ago

you can still edit power bi report from website directly, power bi desktop is not exclusive here either

1 赞同 1 回复 1 评论 1 举报 1 次

Bing:

You should use **Power BI Desktop** to customize the content pack reports. The correct answer is **B. Power BI Desktop**. Power BI Desktop is a powerful data visualization and reporting tool that allows you to create custom reports and visualizations. You can use it to connect to a variety of data sources, including Dynamics 365 Sales, and create custom reports based on the data. Once you have created your custom reports, you can publish them to the Power BI service, where they can be accessed by others in your organization [1](#).

## Question 45

DRAG DROP -

You use Dynamics 365 Sales. You create a quote and send it to a customer.

You need to add a product to the quote and make the modified quote available to the customer.

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

Select and Place:

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

Answer: 有争议，我不明白第二步为什么不用 get

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

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

✉ DJ26 Highly Voted 1 year, 11 months ago

Correct answer

1 like 1 reply upvoted 6 times

✉ No\_Doubt Most Recent 5 months, 2 weeks ago

I believe this question has two answers for the 2nd step:

To add products from an opportunity to your quote, select Get Products at the top of the Quote form, select an opportunity, and then select OK.  
-OR-

To manually add other products, in the Products section, select the More commands icon More commands icon, and then select Add New Quote Product. More information: Add products to Quote, invoice, or order records

1 like 1 reply upvoted 1 times

✉ LaMa5 8 months, 3 weeks ago

Can anyone tell my why you add the products from the subgrid and not the "Get Products"?

1 like 1 reply upvoted 1 times

✉ Pirozhok 4 months, 1 week ago

In the task it says we need to add a product. Sounds like something new besides what we already had. If you click on Get Products you'll get all existing Opportunity's product, not something new.

1 like 1 reply upvoted 1 times

✉ marin1 1 year, 3 months ago

correct, but i think also works with:

Revise

Get Products

Activate

Based on reference link

1 like 1 reply upvoted 4 times

✉ SashM 1 year, 5 months ago

Correct.

1 like 1 reply upvoted 2 times

## Question 46

DRAG DROP -

You use products with properties for your opportunities in Dynamics 365.

You are adding a new product to your product catalog.

You need to create the product with a new set of properties.

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

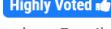
Select and Place:

Components	Answer Area
Product Bundle	
Product	
Product Family	
Properties	

Answer:

Components	Answer Area
Product Bundle	Product Family
Product	Properties
Product Family	Product
Properties	

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

- ✉️  **justin\_s**  1 year, 2 months ago  
Why not Product Family -> Product -> Properties ?  
   upvoted 6 times
- ✉️  **Candy2002** 10 months, 3 weeks ago  
As the property should share within the product family, thus, we need to setup the properties first before having product  
   upvoted 1 times
- ✉️  **MARIANA123** 11 months, 1 week ago  
I agree, according to the link, it's Product Family > Product properties > Add New Property  
   upvoted 1 times
- ✉️  **DJ26**  1 year, 11 months ago  
Correct answer  
   upvoted 5 times
- ✉️  **No\_Doubt**  5 months, 2 weeks ago  
\*\*Correct answer\*\* as per the link  
<https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/create-product-family>

- 6- In the list of products, families, and bundles, open the family that you just created.  
7- On the Product Properties tab, select the Add New Property button, and add the required properties

So the order is now like:

- 1- Open the family that you just created (configure product family)
- 2- On the Product Properties tab, select the Add New Property button, and add the required properties (Add the properties)
- 3- Create products under the above family

   upvoted 2 times

Bing:

To create a new product with a new set of properties in Dynamics 365 Sales, you should configure the following three product catalog components in sequence:

1. **Product Family:** Define your product catalog by organizing your products in a hierarchical structure by creating products and bundles under a product family <sup>1</sup>.
2. **Properties:** Add properties (attributes) to the parent product family so that all the child products and bundles under a product family automatically inherit the properties <sup>1</sup>.
3. **Product:** Create a new product under the product family you created in step 1. The new product will inherit the properties you added to the parent product family in step 2 <sup>2</sup>.

## Question 47

DRAG DROP -

You create a discount list for a company.

Two salespeople encounter the following issues when they create opportunities:

- ☞ Salesperson1 does not see the discount on the opportunity line item.
- ☞ Salesperson2 sees the discount applied to the line total instead of the unit price.

You need to ensure that discounts are applied properly.

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

NOTE: Each correct selection is worth one point.

Select and Place:

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

Answer:

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

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

<https://learn.microsoft.com/en-us/training/modules/manage-organize-product-catalog-dynamics-365-sales/6-configure-product-catalog>

✉ **ceejaybee** 1 year, 2 months ago

In exam, Jun-22

upvoted 1 times

✉ **justin\_s** 1 year, 2 months ago

the answer is correct. In app setting -> Product Catalog setting -> Discount calculation method, set to "Per unit".

upvoted 4 times

✉ **Newb007** 1 week, 1 day ago

Its correct <https://learn.microsoft.com/en-us/training/modules/manage-organize-product-catalog-dynamics-365-sales/6-configure-product-catalog>

upvoted 1 times

✉ **L3tty** 1 year, 2 months ago

given answer is "system settings" not "app settings"

upvoted 1 times

✉ **AAR75** 1 year, 4 months ago

I think for both it is update the price list item

upvoted 3 times

## Question 48

A company uses Dynamics 365 Sales.

You need to email a quote to a customer.

Which user interface option should you use?

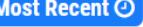
- A. Assign
- B. Share
- C. Form Editor
- D. Print Quote for Customer

Answer: D

✉  **DJ26**  1 year, 11 months ago

Correct answer

   upvoted 7 times

✉  **ceejaybee**  1 year, 2 months ago

In exam, Jun-22

   upvoted 1 times

✉  **Kratinhos** 1 year, 3 months ago

On exam 27/4/22. Passed. I selected same answer

   upvoted 1 times

✉  **An01234** 1 year, 4 months ago

on erxam

   upvoted 1 times

Bing:

To email a quote to a customer in Dynamics 365 Sales, you should use the **Print Quote for Customer** option. This option allows you to print the quote or send it as an email attachment to the customer  . The other options you mentioned, Assign, Share, and Form Editor, are not used for emailing quotes to customers. Is there anything else you would like to know? 😊

## Question 49

You are a salesperson using Dynamics 365 Sales.

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

What should you do first in the opportunity?

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

Answer: A

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

✉  **DJ26**  1 year, 11 months ago

Correct answer

   upvoted 7 times

✉  **SashM**  1 year, 5 months ago

Correct 100%

   upvoted 1 times

✉  **christosp619** 1 year, 6 months ago

**Selected Answer: A**

Correct

   upvoted 1 times

✉  **lummi** 1 year, 11 months ago

correct tested

   upvoted 3 times

## Question 50

You are a system customizer in Dynamics 365 Sales.

You need to set up product families.

Which option is available?

- A. Create a maximum of 10 child product families.
- B. Change product properties on a published product.
- C. Add the product to multiple product families.
- D. Set a product property as an option set.

Answer: D

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

✉ **Ines15** 9 months, 2 weeks ago

**Selected Answer: D**

Correct

upvoted 1 times

✉ **EgycrmDev** 12 months ago

**Selected Answer: D**

Correct

upvoted 1 times

✉ **EgycrmDev** 1 year, 1 month ago

**Selected Answer: C**

Parent family is a lookup, you can set this to only one family

upvoted 2 times

✉ **loulou2105** 1 year, 8 months ago

Correct

upvoted 4 times

Bing:

As a system customizer in Dynamics 365 Sales, when setting up product families, you have the option to **set a product property as an option set**<sup>1</sup>. This allows you to define a set of options for a product property, making it easier for sales agents to select the appropriate value when creating or editing a product. The other options you mentioned are not available. You cannot create a maximum of 10 child product families, change product properties on a published product, or add the product to multiple product families<sup>2</sup>. Is there anything else you would like to know?

## Question 51

You are a system customizer in Dynamics 365 Sales.

You need to set up product families.

Which option is available?

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

Answer: C

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

✉️  **EgycrmDev** 1 year, 1 month ago

**Selected Answer: C**

Correct

   upvoted 2 times

✉️  **DJ26** 1 year, 11 months ago

Correct answer

   upvoted 4 times

## Question 52

HOTSPOT -

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

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

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

NOTE: Each correct selection is worth one point.

Hot Area:

### Answer Area

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

ET User:

Add the products from PriceListA, change to PriceListB, and add the remaining products

The estimated revenue is recalculated according to the prices currently displayed on the product line items grid

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

gromoteegg Highly Voted 2 years, 9 months ago

i think should 2,2

upvoted 21 times

Candy2002 10 months, 3 weeks ago

2, 2 is more logical. The controversial question is Q2. Ruling out on Q2-A, as the opportunity only assign 1 price list, it cannot be done for having so-called "2 Current Price Lists". And I am ruling out Q2-3, because in the business world, it is not uncommon that we have renewed the price list after we have provided a price in opportunity. It is not making sense if the recalculate function is following the price change. I guess, 2, 2 is more making sense to me.

upvoted 1 times

KevH 2 years, 9 months ago

Think your right on this one. Just tested it.

I have product 1 from pricelist 1 \$500

I have Product 1 from pricelist 2 \$1,250

Select "Recalculate opportunity". Just to be sure

Est Revenue field is showing \$1,750

upvoted 6 times

Natalia 2 years, 8 months ago

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

upvoted 1 times

Dean0918 2 years, 5 months ago

Many thanks!

upvoted 1 times

Dean0918 2 years, 5 months ago

2,2 is correct

upvoted 2 times

loulou2105 1 year, 8 months ago

It's actually the second answer for the 2nd question if the opportunity is using the System Calculated option

upvoted 1 times

- ✉  **yakusacian**  1 year, 9 months ago  
Tested. The given answers are correct. only the active price list is calculated. answers are 2,3  
   upvoted 5 times
- ✉  **christosp619** 1 year, 6 months ago  
Answer is 2,3.  
Tested also. Prices are changed to active price list.  
   upvoted 1 times
- ✉  **ceejaybee**  1 year, 2 months ago  
In exam, Jun-22  
   upvoted 2 times
- ✉  **Kratinhos** 1 year, 3 months ago  
On exam 27/4/22. Passed. I selected 2,2  
   upvoted 1 times
- ✉  **An01234** 1 year, 4 months ago  
on exam  
   upvoted 1 times
- ✉  **An01234** 1 year, 4 months ago  
on exam  
   upvoted 1 times
- ✉  **lakshmig** 2 years, 1 month ago  
i think it is 2,2  
   upvoted 1 times
- ✉  **lakshmig** 2 years, 1 month ago  
1st one seems correct  
2nd one must be 2 as the question is abt recalculate  
   upvoted 1 times
- ✉  **ad3791** 2 years, 2 months ago  
on exam  
   upvoted 2 times
- ✉  **Snocer** 2 years, 5 months ago  
I tested this and it should be 2, 1  
Changes in PricelistA and PricelistB are reflected to Opportunity within recalculation. Each Item in the Opportunity gets the new price according to the Pricelist.  
   upvoted 3 times
- ✉  **Possimus** 1 year, 1 month ago  
I also tested You are right!  
   upvoted 1 times
- ✉  **jkaur** 2 years, 6 months ago  
Answer is 2,2.  
   upvoted 2 times

Answer:

## Answer Area

### Requirement

### Action

Add the products to the opportunity.

Add both price lists to the opportunity and add the products from both PriceListA and PriceListB
<b>Add the products from PriceListA, change to PriceListB, and add the remaining products</b>
Add the products to the opportunity and specify PriceListA or PriceListB on the product

Select Recalculate on an opportunity.

Each product is recalculated using the current list price both PriceListA and PriceListB
The estimated revenue is recalculated according to the prices currently displayed on the product line items grid
<b>The products on the active price list in the opportunity are recalculated according to current list price</b>

Bing for Box 2:

The correct answer is B. The estimated revenue is recalculated according to the prices currently displayed on the product line items grid <sup>1</sup>. When you add a product to an opportunity, the opportunity's estimated revenue value is calculated based on the price, discounts, taxes, and other pricing modifications for the product <sup>2</sup>. To change the estimated revenue value of an opportunity based on any changes to the associated products or product quantities, you need to recalculate the opportunity <sup>1</sup>. To do this, you need to open the opportunity for which you want to recalculate the estimated revenue, go to the Product line items tab, and verify that Revenue is set to System Calculated. Then, in the grid, modify the list of products associated with the opportunity and select Save. Finally, on the command bar, select Recalculate <sup>1</sup>. It's important to note that if there are any changes to existing opportunity products associated with closed opportunities, the prices aren't recalculated <sup>1</sup>.

## Question 53

HOTSPOT -

You manage a Dynamics 365 Sales environment.

You need to configure the default status for each lead.

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

NOTE: Each correct selection is worth one point.

Hot Area:

### Answer Area

Scenario	Status reason
A lead is created and contacted by phone.	<div style="border: 1px solid black; padding: 5px; display: inline-block;"><input type="checkbox"/> New-Contacted <input type="checkbox"/> Open-Contacted <input type="checkbox"/> Qualified-New <input type="checkbox"/> Qualified-Qualified</div>
A lead has no contact method available.	<div style="border: 1px solid black; padding: 5px; display: inline-block;"><input type="checkbox"/> Open-Cannot Contact <input type="checkbox"/> Qualified-Cannot Contact <input type="checkbox"/> Disqualified-Cannot Contact</div>
A lead is ready to be an opportunity.	<div style="border: 1px solid black; padding: 5px; display: inline-block;"><input type="checkbox"/> Qualified-New <input type="checkbox"/> Qualified-Qualified <input type="checkbox"/> Qualified-Closed</div>

Answer:

## Answer Area

Scenario	Status reason								
A lead is created and contacted by phone.	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 2px;">New-Contacted</td> <td style="width: 20px; text-align: right; padding: 2px;">▼</td> </tr> <tr> <td style="background-color: #90EE90; padding: 2px;">Open-Contacted</td> <td style="width: 20px; text-align: right; padding: 2px;">▼</td> </tr> <tr> <td style="padding: 2px;">Qualified-New</td> <td style="width: 20px; text-align: right; padding: 2px;">▼</td> </tr> <tr> <td style="padding: 2px;">Qualified-Qualified</td> <td style="width: 20px; text-align: right; padding: 2px;">▼</td> </tr> </table>	New-Contacted	▼	Open-Contacted	▼	Qualified-New	▼	Qualified-Qualified	▼
New-Contacted	▼								
Open-Contacted	▼								
Qualified-New	▼								
Qualified-Qualified	▼								
A lead has no contact method available.	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 2px;">Open-Cannot Contact</td> <td style="width: 20px; text-align: right; padding: 2px;">▼</td> </tr> <tr> <td style="background-color: #90EE90; padding: 2px;">Qualified-Cannot Contact</td> <td style="width: 20px; text-align: right; padding: 2px;">▼</td> </tr> <tr> <td style="background-color: #90EE90; padding: 2px;">Disqualified-Cannot Contact</td> <td style="width: 20px; text-align: right; padding: 2px;">▼</td> </tr> </table>	Open-Cannot Contact	▼	Qualified-Cannot Contact	▼	Disqualified-Cannot Contact	▼		
Open-Cannot Contact	▼								
Qualified-Cannot Contact	▼								
Disqualified-Cannot Contact	▼								
A lead is ready to be an opportunity.	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 2px;">Qualified-New</td> <td style="width: 20px; text-align: right; padding: 2px;">▼</td> </tr> <tr> <td style="background-color: #90EE90; padding: 2px;">Qualified-Qualified</td> <td style="width: 20px; text-align: right; padding: 2px;">▼</td> </tr> <tr> <td style="padding: 2px;">Qualified-Closed</td> <td style="width: 20px; text-align: right; padding: 2px;">▼</td> </tr> </table>	Qualified-New	▼	Qualified-Qualified	▼	Qualified-Closed	▼		
Qualified-New	▼								
Qualified-Qualified	▼								
Qualified-Closed	▼								

<https://community.dynamics.com/crm/b/rockmycrm/posts/changing-the-lead-qualification-status-values>

- ✉ **WASSIM2020** Highly Voted 2 years, 9 months ago  
Correct answer!  
👍 ↵ 📈 upvoted 10 times
- ✉ **KevH** 2 years, 9 months ago  
Indeed  
👍 ↵ 📈 upvoted 3 times
- ✉ **ceejaybee** 1 year, 2 months ago  
correct, the other combinations don't exist as per ref url from yakusaclan; e.g there is only qualified-qualified option, not qualified-closed  
👍 ↵ 📈 upvoted 1 times
- ✉ **ceejaybee** Most Recent 1 year, 2 months ago  
In exam, Jun-22  
👍 ↵ 📈 upvoted 1 times
- ✉ **Kratinhos** 1 year, 3 months ago  
On exam 27/4/22. Passed. I selected same answer  
👍 ↵ 📈 upvoted 1 times
- ✉ **AAR75** 1 year, 4 months ago  
Correct Answer is Open-Contacted; Disqualified- cannot contact; Qualified-Closed  
👍 ↵ 📈 upvoted 1 times
- ✉ **An01234** 1 year, 4 months ago  
On exam  
👍 ↵ 📈 upvoted 1 times
- ✉ **SashM** 1 year, 4 months ago  
isn't 3rd one qualified-closed?  
👍 ↵ 📈 upvoted 2 times
- ✉ **yakusaclan** 1 year, 9 months ago  
correct.  
The Lead statuscode field has three status':  
Open  
Qualified  
Disqualified  
<https://community.dynamics.com/crm/b/rockmycrm/posts/changing-the-lead-qualification-status-values>  
👍 ↵ 📈 upvoted 2 times

## Question 54

HOTSPOT -

You implement the Dynamics 365 App for Outlook.

You need to associate emails to lead records.

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

NOTE: Each correct selection is worth one point.

Hot Area:

### Answer Area

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

Answer:

### Answer Area

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

<https://docs.microsoft.com/en-us/dynamics365/outlook-app/user/email-template>

zzecevic **Highly Voted** 2 years, 9 months ago

Correct answer is 2,2... To send new email from Outlook, select Dynamics 365 App Email Template - type Lead and new email is automatically tracked.

upvoted 13 times

justin\_s 1 year, 2 months ago

No, you are wrong.  
The question is "associate with lead", insert a mail template is only the mail content, you must set the regarding manually. Adding mail activity will automatically set the regarding.

upvoted 1 times

zzecevic 2 years, 9 months ago

Also, statement is You implement the Dynamics 365 App for Outlook, so email is sent from Outlook and not from Dynamics app

upvoted 7 times

gpmotetgg **Highly Voted** 2 years, 9 months ago

I think should is 2,1

upvoted 13 times

MsSana 10 months ago

Correct

upvoted 1 times

d365ppp **Most Recent** 1 year, 1 month ago

Undoubt

upvoted 1 times

Stanna 1 year, 5 months ago

<https://docs.microsoft.com/en-us/dynamics365/outlook-app/user/email-template>

upvoted 1 times

ad3791 2 years, 2 months ago

on exam, I believe it is 2,2 because creating a lead template will affect all leads, just editing the single timeline only affects one lead

upvoted 2 times

  **Ranjeet\_Patel** 2 years, 5 months ago

I think it should be 2, 1.  
for the new Email first, we will create an email from the lead timeline then only we will insert the template.

   upvoted 4 times

  **jkaur** 2 years, 7 months ago

Correct

   upvoted 1 times

## Question 55

You manage a Dynamics 365 environment. A user named User1 begins work on an opportunity.

User1 asks a user named User2 to assist with the opportunity while she is on vacation.

You need to ensure that User2 can access the opportunity and that User1 retains ownership of the opportunity.

What should you do?

- A. Share the record with User2
- B. Grant User2 the security role
- C. Instruct User2 to follow the record
- D. Add User2 to the Sales team

Answer: A

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

☞ Add User2 to an Access team.

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

- ☞ Grant User2 the stakeholder role
- ☞ Assign the record to User2.
- ☞ Add User2 to the Owner team.

<https://docs.microsoft.com/en-us/dynamics365/customer-engagement/developer/security-dev/use-record-based-security-control-access-records#sharing-records>

<https://docs.microsoft.com/en-us/dynamics365/sales/stakeholders-sales-team-members>

✉  **ceejaybee** 1 year, 2 months ago

**Selected Answer: A**

Without knowing the organisation's security setup it is difficult to state what the "correct" option is, because Users 1 and 2 could already be able to access each other's opps. User 2 may not have a Sales sec role, or there may not even be a Sales Team set up, etc. So the best hypothetical answer, making a lot of assumptions about the org, is answer A

   upvoted 1 times

✉  **Gosaisnehal** 1 year, 3 months ago

**Selected Answer: A**

Share Record  
   upvoted 2 times

✉  **Stanna** 1 year, 5 months ago

Answer is Sales Team  
<https://docs.microsoft.com/en-us/dynamics365/sales/stakeholders-sales-team-members>  
   upvoted 1 times

✉️  **lakshmig** 2 years, 1 month ago

i think the option in recent exam was ' Assign record to user 2' instead of share..which is same as sharing the record

   upvoted 1 times

✉️  **MiguelNepomuceno** 2 years, 1 month ago

According to the option you stated - assigning a record is incorrect as it changes the ownership to user 2... makes more sense if Access Teams replace it.

   upvoted 8 times

✉️  **OleGL** 2 years, 9 months ago

Correct answer

   upvoted 1 times

✉️  **KevH** 2 years, 9 months ago

Rumour has it that they are using the "Access Team" option in the exam

   upvoted 7 times

Bing:

To ensure that User2 can access the opportunity and that User1 retains ownership of the opportunity, you should **share the record with User2**. Sharing lets users give other users or teams access to specific customer information

 So, the correct answer is **A. Share the record with User2**.

## Question 56

HOTSPOT -

You are a salesperson using Dynamics 365. You receive customer phone calls and manage leads.

You need to qualify leads and send phone calls to sales representatives.

How should you manage each of the following situations? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

### Answer Area

#### Question

You want to convert a phone call. To which type of entity can you convert the call?

#### Record created

Case
Lead

You qualify a lead. For which entity is a record created?

Contact
Case

Answer:

### Answer Area

#### Question

You want to convert a phone call. To which type of entity can you convert the call?

#### Record created

Case
Lead

You qualify a lead. For which entity is a record created?

Contact
Case

<https://community.dynamics.com/crm/f/microsoft-dynamics-crm-forum/316026/phone-to-case-conversion?pifragment-97030=1>

✉ WASSIM2020 Highly Voted 2 years, 9 months ago

Correct answer!

1 like 1 reply upvoted 9 times

✉ Ram\_Has Most Recent 9 months ago

When converting Case, two options appear in dropdown (Opportunity or Case), see link - <https://community.dynamics.com/crm/f/microsoft-dynamics-crm-forum/316026/phone-to-case-conversion?pifragment-97030=1>

1 like 1 reply upvoted 1 times

✉ Candy2002 11 months ago

I tested in D365, seems it is now available to convert call to Case, Opportunity & Lead. Any ideas on this question?

1 like 1 reply upvoted 1 times

✉  **Dean0918** 2 years, 5 months ago

Tested.

A phone only can be converted to Case or Opportunity.  
Answer is correct.

   upvoted 4 times

✉  **jkaur** 2 years, 7 months ago

Correct

   upvoted 1 times

✉  **karthik2021** 2 years, 7 months ago

Is it not possible to convert a Phone call Activity into Lead? Confused!

   upvoted 1 times

✉  **karthik2021** 2 years, 7 months ago

I think the keyword here is 'receive customer phone calls and manage leads' where 'customer' means existing contacts

   upvoted 2 times

✉  **Farahood** 2 years, 7 months ago

Its possible to convert a phone call into case and opportunity.

   upvoted 3 times

✉  **tymothi** 2 years, 8 months ago

I think it is also possible to convert a phone call into a lead:

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

   upvoted 1 times

✉  **WASSIM2020** 2 years, 7 months ago

No, you can not convert a call phone to lead, tested in D36 online

   upvoted 2 times

✉  **avow** 2 years, 7 months ago

Yes you can convert phone call activities to leads. The answer Case is still the right answer to this question though.

   upvoted 1 times

✉  **WASSIM2020** 2 years, 7 months ago

With a rule but not with convert button

   upvoted 3 times

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

## Question 57

You manage a Dynamics 365 Sales environment.

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

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

NOTE: Each correct selection is worth one point.

- A. Service activity
- B. Email
- C. Phone call
- D. Task
- E. Custom activity

ET User: BCD/ABE

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

✉️ **dm1std** Highly Voted 2 years, 9 months ago

The question is about automatic creation rules. Though automatic creation rules, every option is correct - just tried it - so... what is the correct answer?  
<https://docs.microsoft.com/en-us/dynamics365/customer-service/set-up-rules-to-automatically-create-or-update-records>

upvoted 15 times

✉️ **jkaur** Highly Voted 2 years, 7 months ago

I think answer is ABE. Because Phone Call, Task, & Appointments can be converted to Opportunity or case- Reason being, you capture these records in CRM with relation to an existing record like contact, account, order etc., that's why system does not give you convert to lead button

Email can be converted to Lead, Opportunity or case- Reason being, email can be received from an unresolved recipient which means email id might not exist in the system; that's why system gives you convert to lead button

It's by design but if you still want it, you can do it by multiple ways like creating a plugin or custom workflow or a real time workflow. Simplest would be creating a real time workflow. You will have to create 3 different workflows each for task, phone call and appointment.

upvoted 8 times

✉️ **HassanSarhan** 2 years, 1 month ago

I think this is right

upvoted 1 times

✉️ **Ram0883** Most Recent 6 months, 1 week ago

Selected Answer: ABE

Phone Call, Task, & Appointments can be converted to Opportunity or case hence what remains is correct answer

upvoted 1 times

✉️ **Candy2002** 10 months, 3 weeks ago

Selected Answer: ABE

Test on original setup, CD can convert to case / opportunity, so the answer is ABE

upvoted 1 times

✉️ **gunjee** 1 year, 1 month ago

Selected Answer: ABE

Phone call and task cannot be converted to a lead

upvoted 1 times

- ✉ **Jurka** 1 year, 3 months ago  
Selected Answer: ABE  
Phone Call and Task can't be converted to Leads. So the correct answer is ABE  
 upvoted 1 times
- ✉ **Earson** 1 year, 8 months ago  
the correct answer is ABE, the CE can convert to opportunity and case.  
 upvoted 1 times
- ✉ **MaxCS** 2 years, 2 months ago  
The correct answer is BCD, with a creation rule if it is possible to convert a call into a lead ... verified with a trial environment  
 upvoted 4 times
- ✉ **Doppelfinger** 2 years, 3 months ago  
Previous question stated - Phone call cannot be converted to lead, only case and opportunity  
 upvoted 3 times
- ✉ **Lanlth052** 2 years, 4 months ago  
All answers are correct in the MS document. Logically, I think the question mentioned about "Leads" creation and this exam is D365 Sales. We normally generate a lead when contacting customers by Phone call, Email or Task. So, I think BCD are make sense in this scenario  
 upvoted 6 times
- ✉ **Dean0918** 2 years, 5 months ago  
in sure, all of them are right....  
 upvoted 2 times
- ✉ **Dean0918** 2 years, 5 months ago  
created several "Record Creation and update rules, all of the types could be created.  
 upvoted 1 times
- ✉ **RPD365** 2 years, 7 months ago  
Confused, correct answer is all 5 can be converted into a lead - <https://docs.microsoft.com/en-us/dynamics365/customer-service/set-up-rules-to-automatically-create-or-update-records>  
 upvoted 2 times
- ✉ **StefmanIT65** 2 years, 8 months ago  
The monitored activity for a new Record Creation and Update Rule in my testing environment are: Phone Call, Email, Service Activity, Task, Appointment, Social Activity, Customer Voice survey invite, Customer Voice survey response, Booking Alert and Customer Voice alert.  
Each of these activities can be converted to leads (as you can find here: <https://docs.microsoft.com/en-us/dynamics365/customer-service/set-up-rules-to-automatically-create-or-update-records>), but we can choose the right response among only four of them (the first four) and "Service Activity" probably is the less correct one to create a lead.  
 upvoted 3 times
- ✉ **zzecevic** 2 years, 9 months ago  
BCE should be correct because Service Activity is not part of Sales exam.  
<https://docs.microsoft.com/en-us/dynamics365/customer-service/set-up-rules-to-automatically-create-or-update-records>  
 upvoted 1 times
- ✉ **IhateThisNickname** 2 years, 9 months ago  
Phone call can be converted to Opportunity but not Lead. Task cannot be converted either to Lead  
 upvoted 3 times
- ✉ **WASSIM2020** 2 years, 9 months ago  
Correct Answer is BDE, we can not convert Phone call and Service activity to lead  
 upvoted 1 times
- ✉ **BenJames** 2 years, 9 months ago  
You can not convert a task either to a lead  
 upvoted 3 times
- ✉ **WASSIM2020** 2 years, 7 months ago  
You have a reason, but the question is about automatic creation lead with business rule, you can do it with Service activity, call phone, email, task  
 upvoted 1 times

ET Answer: BCD

Bing:

In Dynamics 365 Sales, you can use the record creation rule to automatically convert certain activities to leads. The three activities that can be converted to leads are **B. Email**, **C. Phone call**, and **D. Task**. These activities can be used to keep track of business prospects and can be automatically converted to leads using the record creation rule. Service activity and custom activity cannot be converted to leads using the record creation rule.

## Question 58

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

Which two opportunities can you close as won? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

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

ET User: BD

<https://docs.microsoft.com/en-us/dynamics365/customer-engagement/web-api/quote?view=dynamics-ce-odata-9>

✉️ WASSIM2020 **Highly Voted** 2 years, 9 months ago

We can close opportunity that has only quotes in the won and revised status.

Answer : B D

👉👉👉 upvoted 31 times

✉️ KevH 2 years, 9 months ago

Agreed.

I have an active quote in my Opportunity. When I tried to close as "WON" the error message read "There are still active or draft quotes associated with this opportunity. These must be closed before the opportunity can be closed."

Then

From the Quote, I selected "Created an order" "Which closes the Quote as WON) and it let me close the opportunity.

So

B&D

👉👉👉 upvoted 5 times

✉️ ShawM 2 years, 9 months ago

Exactly... I just tested!!

👉👉👉 upvoted 3 times

✉️ Dean0918 2 years, 5 months ago

Thanks a lot!

👉👉👉 upvoted 3 times

✉️ SKp1200 2 years, 3 months ago

Agreed (as Revised is a status reason for the 'closed' status)

👉👉👉 upvoted 4 times

✉️ Zeus6 **Highly Voted** 2 years, 9 months ago

A similar question earlier in this paper had different answers (of Won and Revised Status)

👉👉👉 upvoted 6 times

✉️ Pirozhok **Most Recent** 4 months, 1 week ago

I am confused. If we revise a Quote, it's becomes inactive with REVISED status and another one in DRAFT status is created. At the same time we know that we cannot close an Oppy that has related Draft quote. So, how it could be possible to select D :)???

👉👉👉 upvoted 1 times

✉  **Gosaisnehal** 1 year, 3 months ago

Selected Answer: BD

We can close opportunity that has only quotes in the won and revised status.

Answer : B D

   upvoted 2 times

✉  **koger** 2 years, 3 months ago

Correct B & D.

Quote must be closed first if it is in draft or active state.

D is correct, since the following status reasons are available for quote:

Select the quote's status - statuscode

Display Name: Status Reason

Value Label

2 In Progress

3 Open

4 Won

5 Lost

6 Canceled

7 Revised

1 In Progress

Checked in the system, too:

"statuscode": 7, (revised)

"statecode": 3, (closed)

<https://docs.microsoft.com/en-us/dynamics365/customer-engagement/web-api/quote?view=dynamics-ce-odata-9>

   upvoted 2 times

✉  **javiercheke** 2 years, 5 months ago

exists won status to quote?

   upvoted 1 times

✉  **Dean0918** 2 years, 5 months ago

A similar question earlier in this paper had different answers (of Won and Revised Status)

   upvoted 1 times

✉  **Friyank** 2 years, 6 months ago

Error you get while closing such opportunity :

There are still active or draft quotes associated with this opportunity. These must be closed before the opportunity can be closed.

   upvoted 1 times

✉  **jkaur** 2 years, 7 months ago

Answer is BD

   upvoted 2 times

ET Answer: BC

Bing:

In Dynamics 365 Sales, you can close an opportunity as won when the customer has accepted your proposal <sup>1</sup>. To close an opportunity as won, you need to select the opportunity in the Sales Hub sitemap, open it, and ensure that all the quotes are in a closed state <sup>1</sup>. Then, at the top of the Opportunity form, you can select "Close as Won" to close the opportunity <sup>1</sup>. In the Close Opportunity dialog box, you can verify the amount in Actual Revenue and make changes if necessary, and enter details about what contributed to winning this opportunity <sup>1</sup>.

Based on this information, the two opportunities that can be closed as won are: **B. an opportunity that has quotes in the won status** and **D. an opportunity that has quotes in the revised status reason**. An opportunity that has quotes in draft status or active status cannot be closed as won because all quotes must be in a closed state before closing an opportunity as won <sup>1</sup>.

## Question 59

HOTSPOT -

You use opportunities in Dynamics 365 Sales.

Opportunities that were closed as lost frequently come back and are eventually won.

You need to be able to track these occurrences and have insight into the process.

What happens during the reopen and close process? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

### Answer Area

Scenario	Result
A lost opportunity is reopened.	<p>The Opportunity Close record is deleted</p> <p>The Opportunity Close record changes status to inactive</p> <p>The Opportunity Close record changes status to In Progress</p>
The same opportunity is closed as won.	<p>The current Opportunity Close record updates with the new close details and status of completed.</p> <p>A new Opportunity Close record is created with the new close details and status of completed.</p>

ET User:

The Opportunity Close record changes status to inactive

A new Opportunity Close record is created with the new close details and status of completed.

 **Mireiarc** **Highly Voted** 2 years, 9 months ago

TESTED in Sandbox environment:

- Reopen Opportunity: Change opportunity close record to "Canceled"
- Close reopened Opportunity: create new opportunity close record as "Completed"

   upvoted 25 times

 **PRASHANTPT** 2 years, 8 months ago

Bhai, answer bata.

   upvoted 5 times

 **qub3** 2 years, 8 months ago

wahi na yaar... khali pili time pass nako

   upvoted 2 times

 **Dean0918** 2 years, 5 months ago

Tested in trail environment:

Same with your results.

Answer should be 2,2.

   upvoted 8 times

 **JoeS007** 1 year, 8 months ago

I sort of agree. However "Canceled" is not an option. The Opp Close record does not change to inactive. It changes to status "Canceled".

   upvoted 3 times

 **pootietang** **Highly Voted** 2 years, 4 months ago

Correct answer is 2 & 2.

When Opportunity is closed, an Opportunity Close activity record is created with a status of Completed.

Once you reopen that Opportunity, the Opportunity Close record's status changes to Canceled.

When you close the Opportunity again, a new Opportunity Close record is created with status of Completed.

   upvoted 7 times

✉  **pootietang**  2 years, 4 months ago

Correct answer is 2 & 2.

When Opportunity is closed, an Opportunity Close activity record is created with a status of Completed.

Once you reopen that Opportunity, the Opportunity Close record's status changes to Canceled.

When you close the Opportunity again, a new Opportunity Close record is created with status of Completed.

   upvoted 7 times

✉  **JudT**  2 months, 1 week ago

" You need to be able to track these occurrences and have insight into the process"

So for Q1, you will observe that the 'first oppo close record' is deleted and will be replace by a 'new oppo close record' state by 'Modified on'

Q2: Option 2 is correct

   upvoted 1 times

✉  **LuluPanda** 1 year, 5 months ago

3 + 1 is correct

   upvoted 1 times

✉  **Jpb99** 2 years ago

Answer is 2 (existing is set to canceled) - 2 (new one created as completed). Both can be seen in Advanced Find when taking actions against the opportunity

   upvoted 3 times

✉  **LukasLu** 1 year, 9 months ago

Chutiyaa, there is no new record created if using advanced find to search those. Look at the record id when you performs action, it remains.

   upvoted 1 times

✉  **bolza** 2 years, 4 months ago

to be honest, I am confused here. I tried it and when I reopen the opportunity it deletes the closed opportunity data record, at least I cant find it anymore. When I close the reopened opportunity as won, it creates a new closed opportunity record. So I think the answer should be 1 and 2. Or am I mistaken?

   upvoted 1 times

✉  **ad3791** 2 years, 2 months ago

I've never used true vanilla D365 but from my experience there's nothing stored in the activities or timeline of an opportunity when it goes from being closed to being reopened. Closed as lost and reopened it becomes active again (in progress, and this makes sense because you start at the last stage of the bpf).

   upvoted 1 times

✉  **MuhammadSaadFahim** 2 years, 5 months ago

Correct Answer Q1=C, Q2=B (Tested)

When Opportunity Won :

- o Opportunity Status: Won
- o Opportunity close record is created (Activity Status: Completed)
- o Create Auto Post WON message.

When Opportunity Reopen (from WON):

- o Opportunity Status: InProgress
- o Change Existing Opportunity close record to "Canceled" (Activity Status: Cancelled)

When reopened Opportunity Close :

- o Opportunity Status: Canceled
- o A new Opportunity close record is created (Activity Status: Completed)
- o and Create Auto Post LOST message.

When Opportunity Reopen (from LOST):

- o Opportunity Status: InProgress
- o Change Existing Opportunity close record to "Canceled" (Activity Status: Cancelled)

   upvoted 4 times

✉  **Naveed\_A** 2 years, 5 months ago

Correct answer: Q1: B, Q2: B

   upvoted 2 times

✉  **jkaur** 2 years, 6 months ago

Answer is 3,1

   upvoted 2 times

✉  **Friyank** 2 years, 6 months ago

TESTED in Sandbox environment:

- Reopen Opportunity: Change opportunity close record to "Canceled"
- Close reopened Opportunity: create new opportunity close record as "Completed"

   upvoted 1 times

✉  **Dean0918** 2 years, 5 months ago

Tested in trail environment:

Same with your results.

Answer should be 2.2.

   upvoted 1 times

- ✉ **jkaur** 2 years, 7 months ago  
answer is B and B  
1 upvoted 3 times
- ✉ **geet12** 2 years, 8 months ago  
Answer should be 2,2. Tried and tested  
1 upvoted 3 times
- ✉ **atanas1914** 2 years, 8 months ago  
If for Q1 as you say the opportunity close record is "Canceled" then for Q1 the correct answer should be 2. Canceled should be the Status Reason (it is like this for opportunities) and the status is Inactive.  
1 upvoted 2 times
- ✉ **BenJames** 2 years, 9 months ago  
Correct Answer Q1=C, Q2=B  
1 upvoted 3 times
- ✉ **BenJames** 2 years, 9 months ago  
Just tested, none of the options suit for Q1 the opportunity close record equals canceled  
1 upvoted 4 times
- ✉ **BenJames** 2 years, 9 months ago  
Correct Answer Q1=A  
1 upvoted 2 times
- ✉ **BoxonToxonFlop** 2 years, 8 months ago  
Test again, and take a look at the timeline for the opportunity that you're closing.  
1 upvoted 1 times

ET Answer:

#### Answer Area

Scenario	Result
A lost opportunity is reopened.	<div style="border: 1px solid black; padding: 5px;"> The Opportunity Close record is deleted  The Opportunity Close record changes status to inactive  <b>The Opportunity Close record changes status to In Progress</b> </div>
The same opportunity is closed as won.	<div style="border: 1px solid black; padding: 5px;"> <b>The current Opportunity Close record updates with the new close details and status of completed.</b>  A new Opportunity Close record is created with the new close details and status of completed. </div>

## Question 60

HOTSPOT -

You use Dynamics 365 for Sales. Users search for leads by using email addresses, phone numbers, and comments made in notes.

Users report that the results they obtain when using Global Search are not useful.

You need to configure Dynamics 365 to enable the users to locate leads.

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

NOTE: Each correct selection is worth one point.

Hot Area:

### Answer Area

Requirement	Option		
Configure the columns to include in the search.	<table border="1"><tr><td>Lookup view</td></tr><tr><td>Quick Find view</td></tr></table>	Lookup view	Quick Find view
Lookup view			
Quick Find view			
Include notes in the search.	<table border="1"><tr><td>Categorized Search</td></tr><tr><td>Relevance Search</td></tr></table>	Categorized Search	Relevance Search
Categorized Search			
Relevance Search			

Answer:

### Answer Area

Requirement	Option		
Configure the columns to include in the search.	<table border="1"><tr><td>Lookup view</td></tr><tr><td>Quick Find view</td></tr></table>	Lookup view	Quick Find view
Lookup view			
Quick Find view			
Include notes in the search.	<table border="1"><tr><td>Categorized Search</td></tr><tr><td>Relevance Search</td></tr></table>	Categorized Search	Relevance Search
Categorized Search			
Relevance Search			

<https://docs.microsoft.com/en-us/power-platform/admin/configure-relevance-search-organization>

<https://docs.microsoft.com/en-us/powerapps/user/relevance-search>

✉ OleGL **Highly Voted** 2 years, 9 months ago

Correct answer

Like Reply Flag upvoted 7 times

✉ StefmanIT65 **Highly Voted** 2 years, 8 months ago

Reference: <https://docs.microsoft.com/en-us/powerapps/user/relevance-search>

Like Reply Flag upvoted 5 times

✉ jkaur **Most Recent** 2 years, 7 months ago

Correct

Like Reply Flag upvoted 3 times

## Question 61

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

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

Which option is possible?

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

ET User: C

<https://neilparkhurst.com/2019/03/29/mb-210-microsoft-dynamics-365-for-sales-product-catalog-price-lists/>

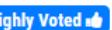
✉  **GeorgeT**  3 years, 8 months ago

Correct Answer:

C

No warning will be shown (tested and confirmed)

   upvoted 47 times

✉  **LucaV6**  3 years, 9 months ago

No warning appear for price list expired.

The correct answer should be the C

   upvoted 31 times

✉  **Candy2002**  10 months, 3 weeks ago

**Selected Answer: C**

There is no warning on the system.

   upvoted 1 times

✉  **EgycrmDev** 1 year ago

**Selected Answer: C**

Answer is C

   upvoted 1 times

✉  **Somasree** 2 years, 5 months ago

Tried out the scenario, I dont see any warning message. Correct answer looks like C.

   upvoted 4 times

- ✉ **Dean0918** 2 years, 5 months ago  
Correct Answer is C.  
 upvoted 2 times
- ✉ **Ranjeet\_Patel** 2 years, 5 months ago  
Tested it. The correct Answer is "C", I did not see any warning, still, the opportunity is calculating the revenue  
 upvoted 6 times
- ✉ **Dean0918** 2 years, 5 months ago  
Many thanks!  
 upvoted 1 times
- ✉ **StevenL1019** 2 years, 6 months ago  
C is correct  
 upvoted 3 times
- ✉ **jkaur** 2 years, 7 months ago  
Correct Answer is C.  
 upvoted 3 times
- ✉ **synalis** 2 years, 7 months ago  
c getestet  
 upvoted 2 times
- ✉ **dkdevaloper** 2 years, 8 months ago  
It is C Sorry, the opportunity uses expired price list or retired product will still continue with its lifecycle  
 upvoted 2 times
- ✉ **KevH** 2 years, 9 months ago  
If a selected price list on an opportunity is expired or deactivated, then the existing opportunities will continue to use the selected price lists, and there will not be any impact on the existing opportunity lifecycle  
  
Answer Should Be "C". In my opinion  
 upvoted 2 times
- ✉ **Zeus6** 2 years, 9 months ago  
I have the same theories as above - C - makes more sense to me  
 upvoted 1 times
- ✉ **khalidBE** 2 years, 11 months ago  
Correct answer is C  
 upvoted 1 times
- ✉ **OLTAC** 3 years ago  
When a price list has expired or becomes invalid, it can be deactivated. When a price list is deactivated, any opportunities, quotes, orders, or invoices that are still open will continue to use the price list until they are completed or closed. However, no new records will be able to reference the deactivated price list. As you can see, the pricing options can be as simple or as complex as your organization desires in order to meet the various business scenarios. An optional field in the price list item is the discount list, which can be used to provide discounts on a price for a product.  
 upvoted 1 times
- ✉ **Kish2** 3 years, 2 months ago  
Answer: C  
<https://neilparkhurst.com/2019/03/29/mb-210-microsoft-dynamics-365-for-sales-product-catalog-price-lists/>  
 upvoted 4 times
- ✉ **Rachha** 3 years, 2 months ago  
c is correct  
 upvoted 1 times
- ✉ **extevao** 3 years, 2 months ago  
And why is the answer always D everywhere? :(  
 upvoted 2 times
- ✉ **MohamedVaga** 3 years, 3 months ago  
Correct answer is C  
 upvoted 1 times
- ✉ **[Removed]** 3 years, 6 months ago  
The actual answer is that expired pricelist has 0 significance and can be used just like a non-expired pricelist. Of course, this option hasn't been provided and hence the closest answer of the given choices is C  
 upvoted 4 times
- ✉ **Preety** 3 years, 6 months ago  
in Exam.  
I think Answer is C  
 upvoted 3 times
- ✉ **JdH** 3 years, 7 months ago  
Correct answer is C  
 upvoted 1 times
- ✉ **Stasy** 3 years, 7 months ago  
When a price list has expired or becomes invalid, it can be deactivated. When a price list is deactivated, any opportunities, quotes, orders, or invoices that are still open will continue to use the price list until they are completed or closed. However, no new records will be able to reference the deactivated price list.  
 upvoted 2 times
- ✉ **Subodh** 3 years, 7 months ago  
Ok.. so what is the correct answer then?  
 upvoted 1 times

✉  **shine** 3 years, 9 months ago

I'm going with the C. I think I have seen this somewhere but can't find the source. Might have been on some video.

   upvoted 5 times

✉  **LucaV6** 3 years, 10 months ago

really it looks like wrong the answer

   upvoted 2 times

✉  **Daggen** 3 years, 11 months ago

Please provide any reference for this

   upvoted 1 times

ET Answer: D

## Question 62

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

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

- ☞ Create an order from a quote.
- ☞ Close the associated opportunity as won.
- ☞ Update the actual values to reflect values from the quote.

Which two opportunities can you close as won? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

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

ET User: AD

✉ **Daggen** 3 years, 11 months ago

A & D are the correct answer

upvoted 45 times

✉ **AndreaDP** 1 year, 7 months ago

Confirm A / D after a lot of headaches! D is tricky actually in fact it mentions status reason = revised. When you revise a quote the system closes the current one into a state Closed with Reason "Revised" and create a new version in state Draft. Now, the draft quote must be deleted and then you can close the opportunity as won, since you will have just one opportunity with status "closed" and "reason" revised. It's a nightmare ....

upvoted 2 times

✉ **dudenKo** 2 years, 4 months ago

for sure!

upvoted 1 times

✉ **GeorgeT** 3 years, 8 months ago

Correct Answer:

A & D

upvoted 15 times

✉ **d365ppp** 1 year, 1 month ago

**Selected Answer: AD**

Opportunities can not be closed with Draft and Active Quotes

\*\*\*\*\*There are still active or draft quotes associated with this opportunity. These must be closed before the opportunity can be closed.\*\*\*\*\*

upvoted 2 times

✉ **Gosainsnehal** 1 year, 3 months ago

**Selected Answer: AD**

Correct Answer:

A & D

upvoted 1 times

✉ **MaestroQ** 1 year, 9 months ago

**Selected Answer: AD**

checked it!!!

upvoted 2 times

- ✉ **ad3791** 2 years, 2 months ago  
Identical to a recent previous question just worded differently. Really strange that this one did not have original correct answers  
🕒 🗑️ 🏷️ upvoted 1 times
- ✉ **Don\_George** 2 years, 5 months ago  
A and D!!!  
🕒 🗑️ 🏷️ upvoted 1 times
- ✉ **meriadoc71** 2 years, 5 months ago  
But if the quote is in revised state it means that the quote is in a draft state and if i'm not wrong is not possible to close on opp if its quote is in draft state  
🕒 🗑️ 🏷️ upvoted 2 times
- ✉ **Ben2021\_1** 1 year, 8 months ago  
Correct. I checked and it seem not to be possible to Close opportunity as won if it has a quote in revised state  
🕒 🗑️ 🏷️ upvoted 1 times
- ✉ **Ranjeet\_Patel** 2 years, 5 months ago  
Tested it. A and D are the correct answers.  
  
I tried closing the opportunity and got this answer when one of the quotes was not in won status.  
  
MSG is below:  
\*\*Opportunity cannot be closed\*\*  
There are still active or draft quotes associated with this opportunity. These must be closed before the opportunity can be closed.  
🕒 🗑️ 🏷️ upvoted 2 times
- ✉ **Dean0918** 2 years, 5 months ago  
Thanks a lot ! should be A and D  
🕒 🗑️ 🏷️ upvoted 1 times
- ✉ **jkaur** 2 years, 7 months ago  
A and D  
🕒 🗑️ 🏷️ upvoted 1 times
- ✉ **padminie** 2 years, 8 months ago  
You cannot close Opportunity if it still have Draft or Active Quotes! so A , D.  
🕒 🗑️ 🏷️ upvoted 1 times
- ✉ **dkdeveloper** 2 years, 8 months ago  
A & D this is really wrong  
🕒 🗑️ 🏷️ upvoted 2 times
- ✉ **Natalia** 2 years, 8 months ago  
If create the Opportunity with different status of Quote and click Won button system shows a message: "You can't close the opportunity as close won if there are active or draft quotes are associated with it. There are still active or draft quotes associated with this opportunity. These must be closed before the opportunity can be closed." When Order created from Quote, Quote has Won status, if close Quote with Reason status Revise and select No to not create revise quote, Quote has Closed status  
🕒 🗑️ 🏷️ upvoted 1 times
- ✉ **kantishwar** 3 years, 1 month ago  
A and D confirmed  
🕒 🗑️ 🏷️ upvoted 2 times
- ✉ **Rachha** 3 years, 2 months ago  
ad ans  
🕒 🗑️ 🏷️ upvoted 2 times
- ✉ **Mukesh87Prasad** 3 years, 2 months ago  
Correct Solution is A & D  
🕒 🗑️ 🏷️ upvoted 2 times
- ✉ **Mike71** 3 years, 6 months ago  
Answers are A&D. If you try and close the quote using "Closed quote" from the command bar, it will have a status reason of "Revised" by default on next dialog box. Once you close it, you should be able to close the opportunity as close won. You can't close the opportunity as close won if there are active or draft quotes are associated with it.  
🕒 🗑️ 🏷️ upvoted 5 times
- ✉ **Preety** 3 years, 6 months ago  
in exam  
🕒 🗑️ 🏷️ upvoted 2 times
- ✉ **Karthikkeya** 3 years, 8 months ago  
The answer should be only C.  
Reason: The order can be created if the status of the Quotes is active. The below 3 steps are part of Create Order from Quote.  
  
↳ Create an order from a quote.  
↳ Close the associated opportunity as won.  
↳ Update the actual values to reflect values from the quote.  
🕒 🗑️ 🏷️ upvoted 2 times
- ✉ **Bains** 3 years, 4 months ago  
Did you check it practically?? Please do the following -  
1. Create Opportunity  
2. Create multiple quotes and Activate them.  
3. Create Order from one of the Quote (What you said in your second point is only applicable for single Active quote). Please read the question carefully. And the result is Opportunity stays Open. Note you only get close related Opportunity option in dialog when you have one quote but not multiple.
- Please test practically before adding comments. Microsoft has already created mess by creating weird questions.  
🕒 🗑️ 🏷️ upvoted 14 times

ET Answer: AB

## Question 63

A company uses Dynamics 365 for Sales.

You must track a competitor to help your company win a sale.

You need to associate the competitor with a Dynamics 365 entity.

To which type of entity can you associate the competitor?

- A. Opportunity
- B. Lead
- C. Account
- D. Contacts

Answer: A

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

👤 OLTAC Highly Voted 3 years ago

Since opportunity is a potential sale and lead it can be treated as a potential customer, then the correct answer is Opportunity.

👍👎FLAG upvoted 7 times

👤 Gosaismehal Most Recent 1 year, 3 months ago

Selected Answer: A

A OPPORTUNITY

👍👎FLAG upvoted 1 times

👤 Rachha 3 years, 2 months ago

Opportunity

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

👍👎FLAG upvoted 2 times

👤 bellyhsu 3 years, 4 months ago

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

👍👎FLAG upvoted 1 times

👤 MuhammadUllah 3 years, 5 months ago

Correct Answer is Opportunity

👍👎FLAG upvoted 3 times

👤 ned 3 years, 6 months ago

It can be Lead as well !!

👍👎FLAG upvoted 4 times

👤 Bains 3 years, 4 months ago

Sales are not won at lead level :-). Lead is a potential sale i.e. may or may not be converted into actual sale. So the answer is Opportunity.

👍👎FLAG upvoted 8 times

👤 Somil1702 2 years, 5 months ago

You are not likely to have "Competitor" value available at Lead stage, just like you generally don't have "Value" of deal and "estimated closure time". Thats why there is a qualification of lead to Opportunity, which is a more mature version of Lead

👍👎FLAG upvoted 1 times

👤 Preety 3 years, 6 months ago

In exam. Opportunity is correct answer

👍👎FLAG upvoted 4 times

👤 Subodh 3 years, 7 months ago

Should be correct solution

👍👎FLAG upvoted 3 times

👤 HassanEid9090 3 years, 6 months ago

in exam or not

👍👎FLAG upvoted 1 times

## Question 64

HOTSPOT -

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

You need to close opportunities.

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

NOTE: Each correct selection is worth one point.

Hot Area:

### Answer Area

Question	Action
What must you do when you close a successful sale?	<div style="border: 1px solid black; padding: 5px; display: inline-block;"><input type="checkbox"/> Close a qualified <input type="checkbox"/> Close as won</div>
What must you do to close the opportunity?	<div style="border: 1px solid black; padding: 5px; display: inline-block;"><input type="checkbox"/> Fill out the competitor <input type="checkbox"/> Fill out the actual revenue <input type="checkbox"/> Fill out the description</div>

Answer:

### Answer Area

Question	Action
What must you do when you close a successful sale?	<div style="border: 1px solid black; padding: 5px; display: inline-block;"><input checked="" type="checkbox"/> Close a qualified <input checked="" type="checkbox"/> Close as won</div>
What must you do to close the opportunity?	<div style="border: 1px solid black; padding: 5px; display: inline-block;"><input type="checkbox"/> Fill out the competitor <input checked="" type="checkbox"/> Fill out the actual revenue <input type="checkbox"/> Fill out the description</div>

✉ OleGL Highly Voted 2 years, 9 months ago

Correct answer.

- Qualify is for leads, not for opportunities
- actual revenue is required field on (default) opportunity close

   upvoted 12 times

✉ KevH 2 years, 9 months ago

Agreed :-)

   upvoted 1 times

✉ Cyriharsh Most Recent 2 years, 1 month ago

CORRECT!

   upvoted 1 times

## Question 65

A salesperson sends an active quote to a customer. The customer requests another quote that includes the original details from the opportunity.

You need to create multiple quotes.

What should you do?

- A. Close the quote and then create a quote from the opportunity.
- B. Create a revision to the active quote.
- C. Create a new opportunity.
- D. Create a new quote from the original opportunity.

ET User:

D (83%)A (17%)

✉ **inka11** 2 months, 3 weeks ago

**Selected Answer: D**  
D is correct  
 upvoted 1 times

✉ **Pablit0** 5 months ago

**Selected Answer: D**  
D is correct  
 upvoted 1 times

✉ **Candy2002** 10 months, 3 weeks ago

The answer should be D. Because customer needs 2 or more quotes. We cannot close the first one, instead we need to create a new one.  
 upvoted 1 times

✉ **MARIANA123** 11 months, 1 week ago

**Selected Answer: D**  
The customer is just requesting another quote, doesn't mean that the first quote needs to be closed, what if he decides to go with it? Correct answer for me is D  
 upvoted 2 times

✉ **ceejaybee** 1 year, 2 months ago

**Selected Answer: A**  
A. because why would you keep the first quote open at all, when new ones are going to be created.  
 upvoted 2 times

✉ **isuruudara** 5 months, 1 week ago

Coz there may be instances where the customer wants to see the prices of the original opportunity as well. That doesn't mean that the 1st quote is ignored or cancelled.  
 upvoted 1 times

✉ **SashM** 1 year, 5 months ago

**Selected Answer: D**  
I think this is D. Because it says we need to create multiple quotes.  
 upvoted 2 times

✉ **Joana** 1 year, 5 months ago

**Selected Answer: D**  
For me it's D. It doesn't say you need to close anything first. And to add more quotes, we just need to go to the subgrid and add a new quote.  
 upvoted 4 times

- ✉  **yakusaclan** 1 year, 9 months ago  
questions says - The customer requests another quote that includes the original details from the opportunity. This can be achieved only by creating a new quote. given answer A is correct  
   upvoted 1 times
- ✉  **moodi86** 1 year, 7 months ago  
then why would you close the first? you need to create multiple quotes  
   upvoted 2 times
- ✉  **DJ26** 1 year, 11 months ago  
The correct answer is B  
   upvoted 3 times
- ✉  **moodi86** 1 year, 7 months ago  
It didn't ask to modify the first, it just ask to create another one  
   upvoted 1 times
- ✉  **Khleos** 1 year, 11 months ago  
If you have modified your products in the quote and then revise it, you will have the same modified products with a Quote in draft status. I think A is correct  
   upvoted 2 times

ET Answer: A

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

<https://ellipsesolutions.com/dynamics-365-sales-managing-customer-quotes/>

Bing:

If a salesperson sends an active quote to a customer and the customer requests another quote that includes the original details from the opportunity, you can create multiple quotes by creating a **new quote from the original opportunity**. In Dynamics 365 Sales, you can create multiple quotes for an opportunity <sup>1</sup>. So, the correct answer is **D. Create a new quote from the original opportunity**.

## Question 66

You are a system customizer in Dynamics 365 Sales.

You need to set up product families.

Which option is available?

- A. Change the data type of an existing product property.
- B. Add the product to multiple product families
- C. Add the product to only one product family.
- D. Set one product as a parent to another product.

Answer: C

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

✉️  **ramberry** 1 year, 2 months ago

Correct. you add the parent to a product when you create the product to add the product to a product family

   upvoted 1 times

✉️  **moodi86** 1 year, 7 months ago

why not A?

   upvoted 2 times

✉️  **vesamk** 1 year, 3 months ago

i guess compared C is just slightly more meaningful answer, go figure

   upvoted 2 times

✉️  **ramberry** 1 year, 2 months ago

Why would you want to change the data type of an OOB property? the answer is C

   upvoted 1 times

✉️  **loulou2105** 1 year, 8 months ago

Correct

   upvoted 2 times

Bing:

In Dynamics 365 Sales, a product family lets you group and categorize products, making it easier for you to manage them. With product families, you can categorize your products in whichever way is most meaningful to your organization and create child products and product bundles within a product family <sup>1</sup>. As a system customizer, you can add the product to only one product family. So, the correct answer is **C. Add the product to only one product family.**

## Question 67

You manage a Dynamics 365 environment. A user named User1 begins work on an opportunity.

User1 asks a user named User2 to assist with the opportunity while she is on vacation.

You need to ensure that User2 can access the opportunity and that User1 retains ownership of the opportunity.

What should you do?

- A. Assign the record to User2.
- B. Grant User2 the stakeholder role.
- C. Add User2 to the Owner team.
- D. Add User2 to an Access team.

Answer: D

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

- ☞ Share the record with User2.

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

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

✉  **swwz666** Highly Voted  1 year, 11 months ago

Correct

   upvoted 7 times

✉  **lummi** 1 year, 11 months ago

correct but disqualified?

   upvoted 1 times

✉  **ramberry** Most Recent  1 year, 2 months ago

Correct! All members of the Access team will have access to the record which I presume User1 was originally a member of

   upvoted 1 times

✉  **SashM** 1 year, 4 months ago

Correct

   upvoted 2 times

## Question 68

HOTSPOT -

A salesperson has an active quote for a customer.

The customer wants to add one product to the quote and remove one product from the quote.

You need to make the changes.

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

Change request	Status
Add a product.	<p>Set the status to Inactive.</p> <p>Close the quote, update the products, and reactivate the quote.</p> <p>Revise the quote, update the products, and reactivate the quote.</p>
Delete a product.	<p>Update the products in the Active state.</p> <p>Close the quote, update the products, and reactivate the quote.</p> <p>Revise the quote, update the products, and reactivate the quote.</p>

Answer:

### Answer Area

Change request	Status
Add a product.	<p>Set the status to Inactive.</p> <p>Close the quote, update the products, and reactivate the quote.</p> <p>Revise the quote, update the products, and reactivate the quote.</p>
Delete a product.	<p>Update the products in the Active state.</p> <p>Close the quote, update the products, and reactivate the quote.</p> <p>Revise the quote, update the products, and reactivate the quote.</p>

<https://neilparkhurst.com/2019/06/27/mb-210-microsoft-dynamics-365-for-sales-quotes/>

 **swwz666** Highly Voted  1 year, 11 months ago

Correct

   upvoted 9 times

## Question 69

A sales manager asks you to add a reason named DealLost to mark opportunities closed as lost.

You need to modify entity fields.

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

NOTE: Each correct selection is worth one point.

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

Answer: CE

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

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

✉️  **chloaus** 2 weeks, 1 day ago

Correct.

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

   upvoted 1 times

✉️  **zaav** 1 year, 8 months ago

Correct

   upvoted 3 times

## Question 70

HOTSPOT -

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

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

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

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

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

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

NOTE: Each correct selection is worth one point.

Hot Area:

**Answer Area**

Scenario	Action
Determine the price of the product bundle.	<ul style="list-style-type: none"><li>Use the lunch bundle price.</li><li>Add the prices of the sandwiches, napkins, and sodas.</li><li>Add the lunch bundle price and the prices of the napkins and sodas.</li><li>Subtract the prices of the napkins and sodas from the lunch bundle price.</li></ul>
Increase the number of sodas at no additional charge.	<ul style="list-style-type: none"><li>Increase the quantity of sodas in the line item.</li><li>Add a new line item for sodas and override the price.</li><li>Add a new line item for sodas with the default price.</li><li>Delete the soda line item from the bundle and add a new line item for all the sodas with the default price.</li></ul>
Increase the number of sandwiches and charge the price list price for each additional sandwich.	<ul style="list-style-type: none"><li>Increase the quantity of sandwiches in the line item.</li><li>Add another line item for sandwiches and override the price.</li><li>Add another line item for sandwiches with the default price.</li><li>Delete the sandwich line item from the bundle and add a new line item for all the sandwiches with the default price.</li></ul>

ET User: 3-2-3

<https://neilparkhurst.com/2019/03/15/mb-210-microsoft-dynamics-365-for-sales-product-catalog-bundles/>

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

**yakusaclan** 1 year, 9 months ago

I guess the answer for 3rd questions is - "Add another line item for sandwiches with the default price".  
The following para is taken from the mentioned reference  
The pricing-related fields are: Unit, Existing Product, Pricing, Price Per Unit, Volume Discount, Quantity, Amount, Manual Discount, Tax, Extended Amount, Product Type code, Transaction Currency, and Parent Bundle. You can modify fields other than these pricing-related fields.

upvoted 7 times

**NanditaTandon** 1 year, 9 months ago

Yes , 3rd answer should be "Add another line item for sandwiches with the default price". As the quantity field for required product in product bundle is locked and we can't edit it.

upvoted 2 times

**JoeSO07** 1 year, 8 months ago

Confirming this. <https://neilparkhurst.com/2019/03/15/mb-210-microsoft-dynamics-365-for-sales-product-catalog-bundles/>  
 upvoted 1 times

**MARIANA123** 11 months, 1 week ago

Answer should be 3-2-3

upvoted 4 times

**Gosaisnehal** 1 year, 3 months ago

ANSWER 3-2-2

upvoted 3 times

**SashM** 1 year, 5 months ago

3rd questions answer is definitely - "Add another line item for sandwiches with the default price". ""Once a bundle has been published (activated) the products within the bundle cannot be changed. It is also important to consider price lists. As the bundle will need to be added to that price list. The price for the bundle will be derived from the bundle price NOT the sum of the prices from the individual components.

Additionally bundles can be offered as suggestions on opportunities. As it is possible to add products and product bundles as relationships."

ref: <https://neilparkhurst.com/2019/03/15/mb-210-microsoft-dynamics-365-for-sales-product-catalog-bundles/>

upvoted 2 times

**Kyol** 1 year, 7 months ago

Didn't realise this was an ENGLISH TEST...

upvoted 4 times

**Eirikafe** 1 year, 10 months ago

Yeah this doesn't make sense to me at all. If the bundle already contains the napkins and soda, why would you add it again?

upvoted 2 times

**Candy2002** 11 months ago

My understanding of the question is the lunch bundle must include sandwiches and customer can choose not have napkins & soda. It doesn't make sense to me to add the price in question 1 too

upvoted 1 times

**mazen111** 1 year, 5 months ago

because they are optional. im sure. see reference

upvoted 1 times

**vogelap** 1 year, 7 months ago

I think it's because they're marked as OPTIONAL...

upvoted 1 times

**Miimene** 1 year, 11 months ago

is it correct ?

upvoted 1 times

**AleMar153** 1 year, 11 months ago

Someone could explain?

upvoted 1 times

**SolimanMasry** 1 year, 9 months ago

Correct , you can check the link "<https://docs.microsoft.com/en-us/dynamics365/sales/pricing-product-bundles>"

When this bundle is added to an opportunity, its price will be calculated as follows:

Total=Product bundle price +Sum of optional products' price

upvoted 2 times

**inscho** 6 months, 2 weeks ago

Well explained. What I find odd is the reference to the bundle price. In the example (see link) the bundle price is equal to the calculation from units and unit price (5x 50USD + 5x70USD). But in the task the bundle price is below the product value (200!=250). This could indicate a discount list and then actually include the napkins and sodas.

upvoted 1 times

**Candy2002** 11 months ago

Can someone explain how this can be applied in real situation? So do the optional means the calculation of price is optional, but not the product itself is optional from customer perspective?

upvoted 1 times

ET Answer:

**Answer Area**

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

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

## Question 71

HOTSPOT -

You use Dynamics 365 for Sales.

You need to add products to an opportunity.

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

NOTE: Each correct selection is worth one point.

Hot Area:

### Answer Area

Scenario	Action
Products are associated with a quote record	<div style="border: 1px solid black; padding: 5px;"><p>Manually add the products to the opportunity</p><p>Use the Get Products option</p><p>Associate the quote with the opportunity</p></div>
Add a product bundle to the opportunity	<div style="border: 1px solid black; padding: 5px;"><p>Add a write-in product</p><p>Add an existing product</p><p>Add the product bundle price list</p></div>

Answer:

### Answer Area

Scenario	Action
Products are associated with a quote record	<div style="border: 1px solid black; padding: 5px;"><p>Manually add the products to the opportunity</p><p>Use the Get Products option</p><p>Associate the quote with the opportunity</p></div>
Add a product bundle to the opportunity	<div style="border: 1px solid black; padding: 5px;"><p>Add a write-in product</p><p>Add an existing product</p><p>Add the product bundle price list</p></div>

<https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/add-products-opportunity#:~:text=In%20the%20Product%20Line%20Items,for%20and%20add%20a%20product>

 **jkaur**  2 years, 7 months ago

Given answers are Correct

   upvoted 10 times

 **Dean0918** 2 years, 5 months ago

Agree with the given answer.

   upvoted 1 times

 **azcheema**  1 year, 4 months ago

It is correct

   upvoted 1 times

 **Bonso** 2 years ago

Question does not say anything about a quote. The opportunity comes before a quote, so manually add products. I am going with the given answers.

   upvoted 3 times

 **lakshmis** 2 years, 1 month ago

1st answer - Associate quote with opportunity

"Any products added to an opportunity are automatically associated with quotes generated from the opportunity."

2nd - add an existing product seems right

   upvoted 2 times

 **[Removed]** 1 year, 9 months ago

I will disagree with your first answer.

The question describes a different order. First quote, then opportunity was created. There is no Get Products option in this order. The correct answer is: "Manually add the products to the opportunity"

   upvoted 1 times

 **buhle\_t** 2 years, 2 months ago

tricky because if you already have the product bundle in the current price list, you can just add an existing product. However if you don't, you would have to switch to the price list containing the product bundle first, THEN add the product bundle. No?

   upvoted 1 times

 **dkdeveloper** 2 years, 8 months ago

The first one should be Associate quote with opportunity, I believe

   upvoted 3 times

 **IhateThisNickname** 2 years, 8 months ago

Not Get Products?

   upvoted 1 times

 **Nataliaii** 2 years, 8 months ago

Get Products button is available on the Quote

   upvoted 7 times

 **CommonQuail** 2 years, 8 months ago

Please refer to the link : <https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/add-products-opportunity#:~:text=In%20the%20Product%20Line%20Items,for%20and%20add%20a%20product>.

Any product added to the opportunity are automatically associated to the quotes generated from the opportunity.

I feel the answers provided are correct.

   upvoted 7 times

## Question 72

You manage Dynamics 365 environments for client organizations.

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

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

Which field should you configure?

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

Answer: A

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

👤 **SteveH** Highly Voted 3 years, 5 months ago

FIELDS mentioned in answers B and D do not exist. Status (answer C) is related to the active state of the record. Only A is a possible correct answer.

👍 ↵ 🗞 upvoted 15 times

👤 **shrustin** 3 years, 3 months ago

Option D, status reason field for opportunity close entity exists.

👍 ↵ 🗞 upvoted 5 times

👤 **PallaviDumps** 2 years, 11 months ago

opportunity close, status and status reason fields exists.

👍 ↵ 🗞 upvoted 3 times

👤 **Subodh** Highly Voted 3 years, 7 months ago

This should be correct answer, since only A seems logical.

👍 ↵ 🗞 upvoted 8 times

👤 **ceejaybee** Most Recent 1 year, 2 months ago

Selected Answer: A

Status Reason field on both the Opportunity and the Opportunity Close entities needs to be updated. If you update Opp and not Opp Close, the new value will not appear in the picklist of the Opp Close dialog. Since you can't select both A and D, it can only be A, because at least you could update Opp Status Reason and add that field to the form to manually update it.

👍 ↵ 🗞 upvoted 2 times

👤 **Gosainsmehal** 1 year, 3 months ago

Selected Answer: A

STATUS REASON

👍 ↵ 🗞 upvoted 1 times

👤 **SalvoIAV** 1 year, 4 months ago

Why D is not the right answer? You should customize values of Opportunity Close Status Reason and ensure that Opportunity Status Reason has the same values.  
<https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/customize-opportunity-close-experience>

👍 ↵ 🗞 upvoted 2 times

👤 **SKpl200** 2 years, 3 months ago

Given answer is correct

👍 ↵ 🗞 upvoted 1 times

- ✉ **jkaur** 2 years, 7 months ago  
Correct  
Upvote 1 times
- ✉ **Zeus6** 2 years, 9 months ago  
A is correct. Out the box 'Cancelled' and 'Out-Sold' are available against the 'Lost' Status. The "Close as Lost" button on the Opportunity form is the 'Status' field. The "Status Reason" dropdown on the Close Opportunity pop-up screen filters and shows all Lost reasons of 'Cancelled' and 'Out-Sold' options. You can of course add/change the status reason values.  
Upvote 2 times
- ✉ **KevH** 2 years, 9 months ago  
Agreed. Tried and tested  
Upvote 2 times
- ✉ **Dean0918** 2 years, 5 months ago  
Agreed with A.  
Upvote 1 times
- ✉ **KVR2906** 2 years, 11 months ago  
A & D should both be correct: "If you add custom values to a Status Reason field against a state (Won/Lost) in the Opportunity entity, you must add the same custom value to the special attribute OpportunityStatusCode on the Opportunity Close entity manually and vice versa." Source: <https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/customize-opportunity-close-experience>  
Not sure if Microsoft will give points on either answer. Maybe the question is not complete and 2 options should be selected?  
Upvote 3 times
- ✉ **Rachha** 3 years, 2 months ago  
A is correct  
Upvote 2 times
- ✉ **MojoTTV** 3 years, 2 months ago  
So why not D Opportunity close status reason ? When you click on close opportunity, you get opportunity close quick form, at which you enter, reason for won, lost, etc, if won actual turnover etc. And question asks specifically, when opportunities are lost.  
Upvote 2 times
- ✉ **Jmart** 3 years ago  
Opp Status Reason is the actual field you want to configure. the Opp close status is a subpart of the Opp Status Reason field.  
Upvote 1 times
- ✉ **Jmart** 3 years ago  
I take back my comment, I see you are referring to the Opp Closed entity and the status reason on that entity. I do wonder the same thing....why not opp closed status reason  
Upvote 2 times
- ✉ **MarkD** 3 years, 2 months ago  
A is correct. VERIFIED by adding "Close/Lost" -status reason to the Opportunity -entitys "Status Reason" -option set, which contains separate sublists for Won/Close -scenarios. New values can be added to both.  
Upvote 4 times
- ✉ **PallaviDumps** 2 years, 11 months ago  
Ultimately, I agree with A. One has to add different "Status Reasons" against Status as "Lost".  
Upvote 1 times
- ✉ **PallaviDumps** 2 years, 11 months ago  
Opportunity OOTB Status has "Lost". Look at the filter criteria of OOTB view Lost Opportunities.  
Upvote 1 times
- ✉ **Stasy** 3 years, 7 months ago  
Why not D?  
Upvote 4 times
- ✉ **sacrefluge961** 3 years, 7 months ago  
You have limited access to the Opportunity close entity. e.g. you can't find it in the advanced find.  
Upvote 2 times
- ✉ **Wolverine93** 3 years, 5 months ago  
Question asks about clarity on Opportunity lost reason. So, logically It should be connected with Opportunity Entity  
Upvote 2 times

Bing:

The field that should be configured to capture the required information is **D. Opportunity close status reason**. When an opportunity is closed as lost, the user can select a competitor they lost the opportunity to and add more details around why the opportunity was lost in the Close Opportunity dialog box <sup>1</sup>. This information is available in the associated Opportunity Close record <sup>1</sup>.

## Question 73

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

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

The company discovers that customers want to buy widgets individually.

You need to add a unit named Each.

What should you do?

- A. Create the unit Each with Box as the base unit.
- B. Update the unit Box with Each as the base unit.
- C. Set Each as the primary unit.
- D. Make Each the base unit for all units.

Answer: C

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

✉ cskurtveit94 11 months, 1 week ago

Tested. C is the correct answer. You Cannot delete a primary unit so you have to change the name of the primary unit and call it each or start at the beginning with the new primary unit. Anyways you have to start by fixing the primary units.

1 upvoted 2 times

✉ Topperdk 1 year, 1 month ago

Why not base unit for all units?

1 upvoted 1 times

✉ runtnerd 1 year, 1 month ago

I think the right answer is A

1 upvoted 2 times

## Question 74

A company is using Dynamics 365 Sales.

Several invoices have an incorrect shipping date.

You need to change the shipping date on all the invoices.

What should you do?

- A. Select an order, edit, and then create an invoice for each incorrect order that corresponds to the invoice.
- B. Select all invoices simultaneously and select Confirm Invoice to change them.
- C. Select individual invoices, select Cancel Invoice for each incorrect order, and then recreate the invoices with the correct date.
- D. Select individual invoices and edit. Repeat for all incorrect invoices.

Answer: D

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

✉️👤 ad3791 Highly Voted 2 years, 2 months ago

D is correct, link states: "It isn't possible to edit multiple invoice records at once."

👍👎FLAG upvoted 10 times

✉️👤 Bialix 2 years, 2 months ago

Not from UI, You can achieve that building a flow or to JS loop for these records.

👍👎FLAG upvoted 1 times

✉️👤 Newb007 1 week, 1 day ago

ok chill out bruh... your right tho

👍👎FLAG upvoted 1 times

✉️👤 SashM 1 year, 5 months ago

Correct.

To Edit an invoice

- 1) In the list of invoices, select the invoice you want to edit.
- 2) Add or change any details about your invoice.
- 3) Select Save in the lower-right corner of the screen.

👍👎FLAG upvoted 1 times

✉️👤 JaibP Most Recent 1 year, 4 months ago

Identify invoice by filtering from advance find, select all (250 in a go) edit and change shipping date. This will change all invoice dates. practically achieved.

👍👎FLAG upvoted 1 times

✉️👤 ceejaybee 1 year, 2 months ago

When selecting multiple invoices from AF, the Edit option is disabled

👍👎FLAG upvoted 1 times

✉️👤 Kyol 1 year, 7 months ago

Didn't realise pressing "Edit" on a record and not even "Save" could fix stuff or change data.

👍👎FLAG upvoted 1 times

Bing:

To change the shipping date on all the invoices, you should **D. Select individual invoices and edit. Repeat for all incorrect invoices.** You can edit an invoice by selecting it and making any additions or corrections before sending it to your customer <sup>1</sup>. This will allow you to change the shipping date on each invoice individually. Option A is incorrect because it involves creating new invoices from orders, which is not necessary in this case. Option B is incorrect because there is no option to select all invoices simultaneously and select Confirm Invoice to change them. Option C is incorrect because it involves canceling the invoices and recreating them, which is not necessary in this case.

## Question 75

You cancel an order in Dynamics 365 Sales by mistake.

You need to mark the order status as fulfilled instead of cancelled.

What should you do?

- A. Change the order status fulfilled.
- B. Activate the order and change the order status to fulfilled.
- C. Recreate the order.
- D. Add the products back in to the original order.

Answer: C

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

✉️  **Gosaisnehal** 1 year, 3 months ago

**Selected Answer: C**

RECREATE ORDER

   upvoted 3 times

Bing:

Unfortunately, once an order is cancelled in Dynamics 365 Sales, it cannot be changed back to fulfilled. You will need to

**C. Recreate the order** <sup>1</sup>. You can create a new order with the same details as the cancelled order and mark it as fulfilled. Option A is incorrect because you cannot change the status of a cancelled order. Option B is incorrect because you cannot activate a cancelled order. Option D is incorrect because you cannot add products back into a cancelled order.

## Question 76

A company uses Dynamics 365 Sales.

You need to add an email activity to both a contact and its corresponding account without setting the Regarding field.

Where should you add the email activity?

- A. Dynamics 365 App for Outlook
- B. Quick Create form
- C. Account record only
- D. Contact record only

Answer: D

✉  **ceejaybee** 1 year, 2 months ago

In exam, Jun-22

   upvoted 2 times

✉  **ceejaybee** 1 year, 2 months ago

**Selected Answer: D**

D - add to Contact, and email will also automatically attach to Contact's parent Account as well

   upvoted 2 times

Bing:

In Dynamics 365 Sales, you can use the enhanced email experience to add an email activity to both a contact and its corresponding account without setting the Regarding field <sup>1</sup>. To do this, you can open the account or contact record, navigate to the Timeline section, and select the "+" button. Then, under Activities, select Email. A new email pop-up window will open, and the From and To fields will be automatically populated based on the user and the account and contact of the original record <sup>1</sup>. So, in this scenario, you should add the email activity from either the **C. Account record only** or **D. Contact record only**. Adding an email activity using the Dynamics 365 App for Outlook or Quick Create form will not allow you to add an email activity to both a contact and its corresponding account without setting the Regarding field.

## Question 77

HOTSPOT -

A company uses Dynamics 365 Sales. The company does not use any customizations.

The system must create activity records for every interaction a salesperson has with customers and contacts.

You need to configure the system by using minimal customizations.

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

NOTE: Each correct selection is worth one point.

Hot Area:

### Answer Area

Activity	Action
Display activities for each contact in the account record.	<ul style="list-style-type: none"><li>Use the default configuration.</li><li>Create a custom relationship between the activity and the contact.</li><li>Add the activity to both the account and contact.</li><li>Create a Power Automate flow to copy the activity from the contact to the account.</li></ul>
Ensure the creation date and the completion date of the activity are recorded separately.	<ul style="list-style-type: none"><li>Use the default configuration.</li><li>Create a custom column for the creation date.</li><li>Create a custom column for the completion date.</li><li>Create a custom control.</li></ul>
View activities in Kanban view.	<ul style="list-style-type: none"><li>Use the default configuration.</li><li>Add a custom control.</li><li>Add a custom view.</li><li>Create a Power Automate flow.</li></ul>

Answer: 第二和三个有争议

[https://www.google.com/search?q=activity+fields+in+entity+D365+slaes+acutal+end&sca\\_esv=557502889&ei=fFHdZI2GKlikptQPrLqQwAg&ved=0ahUKEwiNtJHloOKAAxUIkokEHSwdBIgQ4dUDCBA&uact=5&oq=activity+fields+in+entity+D365+slaes+acutal+end&gs\\_lp=Egxnd3Mtd2I6LXNlcAiMGFjaXRpdml0eSBmaWVsZHMgaW4gZW50aXR5IEQzNjUgc2xhZXMyYWN1dGFsIGVuZDlFEAYogQyCBAAGIkFGKIEMgUQABiiBEjAR1DEJVj4QnADeAGQAQCYAYQBoAGoBKoBAzluM7gBA8gBAPgBAvgBAclCChAAGEcY1gQYsAPCAgcQIRigARgK4gMEGAqQYgGAZAGCA&sclient=gws-wiz-serp#fpstate=ive&vld=cid:720f5ed7,vid:sclotcvbMJk](https://www.google.com/search?q=activity+fields+in+entity+D365+slaes+acutal+end&sca_esv=557502889&ei=fFHdZI2GKlikptQPrLqQwAg&ved=0ahUKEwiNtJHloOKAAxUIkokEHSwdBIgQ4dUDCBA&uact=5&oq=activity+fields+in+entity+D365+slaes+acutal+end&gs_lp=Egxnd3Mtd2I6LXNlcAiMGFjaXRpdml0eSBmaWVsZHMgaW4gZW50aXR5IEQzNjUgc2xhZXMyYWN1dGFsIGVuZDlFEAYogQyCBAAGIkFGKIEMgUQABiiBEjAR1DEJVj4QnADeAGQAQCYAYQBoAGoBKoBAzluM7gBA8gBAPgBAvgBAclCChAAGEcY1gQYsAPCAgcQIRigARgK4gMEGAqQYgGAZAGCA&sclient=gws-wiz-serp#fpstate=ive&vld=cid:720f5ed7,vid:sclotcvbMJk)

<https://www.youtube.com/watch?v=sclotcvbMJk>

<https://docs.microsoft.com/en-us/dynamics365/sales/add-kanban-control>

- ✉ **Vediunedfks** 9 months ago  
The 2nd one is default. the close date of an activity is always tracked separately in the field acutalend  
↑ ↓ → upvoted 2 times
- ✉ **Newb007** 1 week, 1 day ago  
[https://www.google.com/search?q=activity+fields+in+entity+D365+slaes+acutal+end&scs\\_evs=557502889&ei=fFHdZl2GKikptQPrLqQwAg&ved=0ahUKEwiNtJloOKAAxUlkokEHSwdBlgQ4dUDCBA&uact=5&q=activity+fields+in+entity+D365+slaes+acutal+end&gs\\_jp=Egxnd3Mtd2l6LXNcnA1MGfxRpdm0eSBmaWVsZHMsW4gZW50aXR5IEzJnUgc2xhZXMsYWN1dGFslGVuZD1FEAAyogQyCBAAGkFGKIMgUQABiiBEjAR1DEUjV4QnADeAGQAQCYAYQBoAGoBKoBzluM7gBAg8APgBAvgBAClCChAAEGcV1gQySAPCAGcQIRigARgK4gMEGAQgQYgGAZAGCA&sclient=gws-wiz-serp#fpstate=ive&vld=cid:720f5ed7,vid:sclotcvbMJk](https://www.google.com/search?q=activity+fields+in+entity+D365+slaes+acutal+end&scs_evs=557502889&ei=fFHdZl2GKikptQPrLqQwAg&ved=0ahUKEwiNtJloOKAAxUlkokEHSwdBlgQ4dUDCBA&uact=5&q=activity+fields+in+entity+D365+slaes+acutal+end&gs_jp=Egxnd3Mtd2l6LXNcnA1MGfxRpdm0eSBmaWVsZHMsW4gZW50aXR5IEzJnUgc2xhZXMsYWN1dGFslGVuZD1FEAAyogQyCBAAGkFGKIMgUQABiiBEjAR1DEUjV4QnADeAGQAQCYAYQBoAGoBKoBzluM7gBAg8APgBAvgBAClCChAAEGcV1gQySAPCAGcQIRigARgK4gMEGAQgQYgGAZAGCA&sclient=gws-wiz-serp#fpstate=ive&vld=cid:720f5ed7,vid:sclotcvbMJk) True its 1. default, 2. default then 3. add control  
↑ ↓ → upvoted 1 times
- ✉ **Newb007** 1 week, 1 day ago  
woops. here you go. <https://www.youtube.com/watch?v=sclotcvbMJk>  
↑ ↓ → upvoted 1 times
- ✉ **jaxonm** 1 year, 1 month ago  
I thought it was default for all because the question states "The company does not use any customizations."  
↑ ↓ → upvoted 3 times
- ✉ **MARIANA123** 11 months, 1 week ago  
Exactly...  
↑ ↓ → upvoted 1 times
- ✉ **ceejaybee** 1 year, 2 months ago  
Given answers are correct. For Kanban view, it is a bit obscure, but this ref explains <https://docs.microsoft.com/en-us/dynamics365/sales/add-kanban-control>, "Add the Kanban controls" section, image in step 6. Although you don't have to create a custom control, the dialog for Add Control says "select a custom control from the field"  
↑ ↓ → upvoted 4 times
- ✉ **Jurka** 1 year, 3 months ago  
I think the 3rd one is "use default configuration"  
↑ ↓ → upvoted 2 times

ET Answer:

## Answer Area

Activity	Action
Display activities for each contact in the account record.	<p>Use the default configuration.</p> <p>Create a custom relationship between the activity and the contact.</p> <p>Add the activity to both the account and contact.</p> <p>Create a Power Automate flow to copy the activity from the contact to the account.</p>
Ensure the creation date and the completion date of the activity are recorded separately.	<p>Use the default configuration.</p> <p>Create a custom column for the creation date.</p> <p><b>Create a custom column for the completion date.</b></p> <p>Create a custom control.</p>
View activities in Kanban view.	<p>Use the default configuration.</p> <p><b>Add a custom control.</b></p> <p>Add a custom view.</p> <p>Add a Power Automate flow.</p>

Bing:

You can configure the system to create activity records for every interaction a salesperson has with customers and contacts by using the default configuration of Dynamics 365 Sales. In Dynamics 365 Sales, you use activities to plan, track, and organize all your customer communications. For example, you can take notes, send email, make phone calls, set up appointments, and assign yourself tasks as you work a sale or resolve a service case. These actions are all considered types of activities <sup>1</sup>.

To display activities for each contact in the account record, you can **create a Power Automate flow to copy the activity from the contact to the account** This will allow you to view the activities associated with each contact in the account record with minimal customizations <sup>2</sup>.

In Dynamics 365 Sales, you can use the default configuration to create activity records for every interaction a salesperson has with customers and contacts. The system automatically timestamps every activity and shows who created it. You and other people on your team can scroll through the activities to see the history as you work with a customer [1](#).

To ensure that the creation date and completion date of the activity are recorded separately, you can create custom columns for the creation date and completion date. You can do this by creating custom fields on the appropriate table and exposing those new fields on a page [2](#). You can also use custom controls to visualize data in Dynamics 365 Sales [3](#). However, creating custom columns or controls would require some customization, which may not be minimal. So, if you want to configure the system by using minimal customizations, [using the default configuration would be the best option](#). Is there anything else you would like to know? 😊

In Dynamics 365 Sales, you can view activities in a Kanban view. The Kanban view for activities helps salespeople to manage multiple activities quickly. In the Activity Kanban view, activities are represented visually with cards. The lanes represent the default statuses of activities. You can drag the activities to different lanes to move them from one status to another [1](#).

To view activities in a Kanban view, you need to [add a custom control](#). A Kanban view is available when the Kanban control is added to the Activity entity. If you don't see the Kanban view, check with your system customizer [1](#). To add the control, you can follow these steps:

1. In your app, select the Settings icon, and then select Advanced Settings.
2. On the navigation bar, select Settings and then under Customization, select Customizations.
3. Select Customize the System.
4. Under Components in the solution explorer, expand Entities and then select Activity.
5. Go to the Controls tab and select Add Control.
6. In the Add Control dialog box, select Kanban and then select Add [2](#).

Using the default configuration or adding a custom view or a Power Automate flow will not enable you to view activities in a Kanban view. Is there anything else you would like to know? 😊

## Question 78

You are a Dynamics 365 Sales administrator for a car dealership. You create a custom Service entity.

Salespeople must be able to see all related appointments in the timeline. A salesperson creates an appointment but is unable to see any Service records available in the Regarding field. Salespeople have permission to view service record.

You need to ensure that the salesperson is able to connect the appointment to the service.

What should you do?

- A. Create a connection to the Service record.
- B. Add a timeline to the Service form.
- C. Enable activities on the Service entity.
- D. Assign privileges to Activities.

Answer: C

<https://docs.microsoft.com/en-us/dynamics365/outlook-app/enable-a-custom-entity-to-appear-in-the-regarding-lookup>

✉  **ceejaybee** 1 year, 2 months ago

**Selected Answer: C**

C is correct

   upvoted 2 times

Bing: C

To ensure that the salesperson is able to connect the appointment to the service, you should enable activities on the Service entity. This will allow the salesperson to see all related appointments in the timeline and connect the appointment to the service. To do this, you can follow these steps:

1. In your app, select the Settings icon, and then select Advanced Settings.
2. On the navigation bar, select Settings and then under Customization, select Customizations.
3. Select Customize the System.
4. Under Components in the solution explorer, expand Entities and then select Service.
5. In the General tab, scroll down to the Communication & Collaboration section and check the Activities checkbox.
6. Save and publish your changes.

Creating a connection to the Service record, adding a timeline to the Service form, or assigning privileges to Activities will not solve this issue. Is there anything else you would like to know? 😊

## Question 79

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

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

You need to track the company to the opportunity.

What should you do?

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

Answer: C

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

[https://docs.microsoft.com/en-us/dynamics365/sales/close-opportunity-won-lost-sales](#)

👤 MARIANA123 11 months, 1 week ago

Selected Answer: C  
Answer is correct  
 upvoted 1 times

👤 ceejaybee 1 year, 2 months ago

Selected Answer: C  
C - as Opp not editable when closed, and you don't want to reopen it  
 upvoted 1 times

👤 Jurka 1 year, 3 months ago

Should be B because we add the competitor to the opportunity when closing it.  
<https://docs.microsoft.com/en-us/dynamics365/sales/close-opportunity-won-lost-sales>  
 upvoted 1 times

👤 Jurka 1 year, 3 months ago

Nah sorry. My mistake. The answer seems to be right since we don't want to reopen the opportunity and we can associate the opportunity with the competitor under the competitor record.  
 upvoted 4 times

## Question 80

A salesperson is viewing a My Activities list as a calendar.

The salesperson wants to change the status of a phone call by dragging an activity to a new status.

You need to ensure that the salesperson can switch their view type.

What should you do?

- A. Select Show As in the ribbon.
- B. Select Create View in the ribbon.
- C. Remove the Calendar control, and then add the Kanban control to the view.
- D. Add the Kanban control to the view.

ET User: D

👤 ceejaybee Highly Voted 1 year, 2 months ago

Selected Answer: D

D - add Kanban control, as only Kanban allows drag and drop to new status, Calendar control doesn't. Not A, as question asks what you as admin needs to do, not what user needs to do. Not C, as you can have both Kanban and Calendar controls at the same time

👍👎FLAG upvoted 5 times

👤 inka11 Most Recent 2 months, 3 weeks ago

Selected Answer: D

D

You need to ensure that the salesperson can switch their view type = add Kanban

👍👎FLAG upvoted 1 times

👤 bigfootjoe 1 year ago

This is A because this question is specifically asking about "Show As" NOT that the control needs to be added.

👍👎FLAG upvoted 2 times

👤 Dotz 6 months, 2 weeks ago

- You need to have more than one control for the 'show as' button to show.
- If you have another control that is not Kanban, you cannot perform that action
- So you need to add the Kanban control first

👍👎FLAG upvoted 1 times

👤 ramberry 1 year, 2 months ago

Selected Answer: D

D is correct

👍👎FLAG upvoted 1 times

ET Answer: A

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

Bing:

To change the status of a phone call by dragging an activity to a new status, the salesperson should **A. Select Show As in the ribbon**. This will allow them to switch their view type from Calendar to Kanban <sup>1</sup>. In the Kanban view, the salesperson can see a visual representation of their sales activities in their different states and drag them to move from one status to another <sup>1</sup>. Option B is incorrect because creating a new view will not allow the salesperson to change the status of a phone call by dragging an activity. Option C is incorrect because removing the Calendar control and adding the Kanban control to the view is not necessary. Option D is incorrect because simply adding the Kanban control to the view will not allow the salesperson to change the status of a phone call by dragging an activity.

## Question 81

DRAG DROP -

A company uses Dynamics 365 Sales. You qualify a lead record.

Which record is created when you qualify a lead? To answer, drag the appropriate record types to the correct leads. Each record type may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

Select and Place:

### Answer Area

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

Answer:

### Answer Area

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

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

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

✉️👤 **MARIANA123** 11 months, 1 week ago

Correct

   upvoted 2 times

✉️👤 **SharjeelButt** 1 year ago

Correct

   upvoted 1 times

## Question 82

HOTSPOT -

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

You need to determine:

- ☞ Which activities convert to leads.
- ☞ Which field carries over from the activity to the lead.

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

NOTE: Each correct selection is worth one point.

Hot Area:

### Answer Area

**Requirement**  
Which activity type can users convert to leads?

	▼
Task	
Email	
Phone Call	
Appointment	

**Requirement**  
Which field carries over from the activity to the lead?

	▼
Subject	
Regarding	
Start Date	
Existing Contact	

Answer:

### Answer Area

**Requirement**  
Which activity type can users convert to leads?

	▼
Task	
Email	
Phone Call	
Appointment	

**Requirement**  
Which field carries over from the activity to the lead?

	▼
Subject	
Regarding	
Start Date	
Existing Contact	

<https://community.learmmsdynamics.com/post/how-to-create-leads-in-microsoft-dynamics-365-5f157032469b481ed3ad3caa>

✉️👤 **ramberry** 1 year, 2 months ago

Correct! Email can be converted to Leads. The Subject field is carried over to the Opportunity

👍 ↤ 🚩 upvoted 3 times

✉️👤 **ramberry** 1 year, 2 months ago

Sorry. \*carried over to Leads

👍 ↤ 🚩 upvoted 1 times

## Question 83

DRAG DROP -

A salesperson progresses through the Lead to Opportunity sales process.



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

Which action should you perform to advance the business process to each subsequent stage? To answer, drag the appropriate actions to the correct stages. Each action may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

Select and Place:

Actions	Answer Area	
	Current stage	Action
Qualify the lead	Qualify	
Associate a quote to the lead	Develop	
Associate an opportunity to the lead	Propose	
Complete all required fields in the stage		

ET User:

1: Qualify the lead, 2: Complete all required fields, 3: Complete all required fields

✉ luvsgloves **Highly Voted** 1 year, 1 month ago

Actually, testing, you can move to the text stage by completing all required fields and hitting next in any of these options. Only in the Qualify Stage you could also hit the "Qualify" button, so I would answer 1: Qualify the lead, 2: Complete all required fields, 3: Complete all required fields

1 upvoted 8 times

✉ inscho 6 months, 3 weeks ago

I agree with you. In the propose phase i wanted to use the option "Associate a quote to the lead". But that doesn't make sense since on that stage it is an oppy already (not a lead anymore).

1 upvoted 2 times

✉ ceejaybee **Most Recent** 1 year, 2 months ago

I think:

Qualify: Qualify the Lead

Develop: Associate Opp to Lead (this is done automatically by Qualify so doesn't make much sense but process of elimination leaves this as the only answer?)

Propose: Complete all required fields. You don't associate Quotes to Leads so that is the odd one out, unless it is a typo and the answer was supposed to be "Associate Quote to the Opportunity"

1 upvoted 1 times

✉ Jbell1410 1 year, 3 months ago

I think, for develop, it should be complete all required fields in the stage.

from the website:

Develop: The opportunity record is used to develop the details of the deal. Details such as the products and services they are interested in, estimated revenue, and time-lines are added to the opportunity.

More information: Create or edit an opportunity

1 upvoted 2 times

ET Answer:

Actions	Answer Area	
	Current stage	Action
Qualify the lead		Qualify the lead
Associate a quote to the lead	Qualify	
Associate an opportunity to the lead	Develop	Associate an opportunity to the lead
Complete all required fields in the stage	Propose	Associate a quote to the lead

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

## Question 84

A company is using Dynamics 365 Sales without any customizations.

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

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

How many orders should you create?

- A. two
- B. three
- C. four
- D. one

ET User:

**B (57%)**      **D (43%)**

<https://learn.microsoft.com/en-us/dynamics365/sales/create-edit-order-sales>

✉️ **AAR75** Highly Voted 1 year, 3 months ago  
3 order as there are 3 different delivery location

👍 ↗️ 🏴 upvoted 11 times

✉️ **chloaus** Most Recent 2 days, 2 hours ago  
Shipping to two countries implies two currencies are involved. The order and all its line items must use the same currency.  
<https://learn.microsoft.com/en-us/dynamics365/sales/create-edit-order-sales>  
Order item line has shipping address fields and request date field.  
But it does not have freight method, etc.

For tracking order, it is best to create one order for each location and close the order when it is shipped / fulfilled.  
Shipping address fields and request date field at order item line level is for the scenario of shipping the order to a distribution centre.

👍 ↗️ 🏴 upvoted 1 times

✉️ **Candido** 2 months, 2 weeks ago  
" In Dynamics 365 Sales, you can associate a shipping address with each product line in an order by utilizing the concept of order line properties. Order line properties allow you to capture additional information specific to each line item in an order, such as shipping addresses, delivery instructions, or any other relevant details."  
I would go with D, the purchase was done in one currency, only the shipping address is in different countries there is no need to split into 2 orders much less 3.

👍 ↗️ 🏴 upvoted 2 times

✉️ **Paddy7497** 3 months ago  
A. two is correct answer. Because you can add in each product line of an order a shipping address. The description says, that the locations are in US and Canada. So you need one order for each currency. One for US and one order for Canada. That's the minimum of orders you need.

👍 ↗️ 🏴 upvoted 1 times

✉️ **Ram0883** 6 months, 1 week ago  
**Selected Answer: B**  
1 location per order , need 3 location deliveries hence 3 orders

👍 ↗️ 🏴 upvoted 1 times

✉️ **Vediunedfks** 9 months ago  
**Selected Answer: D**  
it is not possible to have more than one delivery address per order

👍 ↗️ 🏴 upvoted 1 times

✉️ **d365ppp** 1 year, 1 month ago  
**Selected Answer: D**  
3 locations so minimum order in each location is one. Answer is D. Just a tricky question testing the common sense

👍 ↗️ 🏴 upvoted 2 times

✉️  **Possumus** 1 year, 1 month ago

3 Different delivery location! 3 Orders!

   upvoted 1 times

✉️  **ceejaybee** 1 year, 2 months ago

**Selected Answer: B**

As AAR75 says, needs to be 3; you can have only 1 location per order

   upvoted 3 times

ET Answer: D

Bing:

In Dynamics 365 Sales, you can create a single order for multiple products to be delivered to multiple locations [1](#).

Therefore, you should create **D. one** order to deliver the four products to the three locations. This will ensure that the order is tracked properly and that the minimum number of orders is created to deliver to the locations.

## Question 85

HOTSPOT -

A customer uses opportunities as part of a sales cycle.

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

- ⇒ an additional status reason when the opportunity is lost
- ⇒ the ability to view details in Advanced Find when the opportunity is lost

You need to configure the system.

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

NOTE: Each correct selection is worth one point.

Hot Area:

**Answer Area**

**Requirement**

**Action**

Add the new status reason

Update statuscode on Opportunity only
Update opportunitystatuscode on Opportunity Close only
Update statuscode on Opportunity and Opportunity Close
Update statuscode on Opportunity and opportunitystatuscode on Opportunity Close

View details in Advanced Find

Select Activities
Select Opportunity
Select Opportunity Close
Select Opportunity Sales Process

Answer:

**Answer Area**

**Requirement**

**Action**

Add the new status reason

Update statuscode on Opportunity only
Update opportunitystatuscode on Opportunity Close only
Update statuscode on Opportunity and Opportunity Close
Update statuscode on Opportunity and opportunitystatuscode on Opportunity Close

View details in Advanced Find

Select Activities
Select Opportunity
Select Opportunity Close
Select Opportunity Sales Process

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

<https://www.toplineresults.com/2016/03/creating-a-query-for-closed-opportunities-in-microsoft-dynamics-crm/>

- ✉ **chloaus** 12 hours, 36 minutes ago  
 Q1 is 4. See <https://learn.microsoft.com/en-us/dynamics365/sales/customize-opportunity-close-experience>.  
 Q2 is 2. Activities table stores info for closed opportunities. It does not store info on whether an opportunity is won or lost.  
 upvoted 1 times
- ✉ **JudT** 6 days, 2 hours ago  
 TESTED:  
 Q-1: Update statuscode on Opportunity only  
 Q-2: Select Activities  
 upvoted 1 times
- ✉ **Zarima** 1 month, 3 weeks ago  
 Tested, for the first question the right answer is 1  
 upvoted 1 times
- ✉ **AhmedGad** 3 months, 3 weeks ago  
 TESTED: Wrong Answer  
 The correct answer is 2,2  
 upvoted 1 times
- ✉ **Abcdaire94** 6 months, 3 weeks ago  
<https://learn.microsoft.com/en-us/dynamics365/sales/customize-opportunity-close-experience>  
 NOTE: "There are two fields on Opportunity Close entity with display name as "Status Reason" but with schema names as statuscode and opportunitystatuscode. It is important to note that custom status reasons should be added to the opportunitystatuscode attribute and not to the statuscode attribute."  
 upvoted 1 times
- ✉ **Ram0883** 7 months, 2 weeks ago  
 For 1st question the given answer is correct Text from the documentation "If you add custom values to a Status Reason field against a state (Won/Lost) in the Opportunity entity, you must add the same custom value to the special attribute OpportunityStatusCode on the Opportunity Close entity manually and vice versa."  
 upvoted 2 times
- ✉ **MsSana** 10 months ago  
 I think for first one option 1 i have tested it if we add new status reason on opportunity it will auto reflect on opportunity close form.  
 upvoted 2 times
- ✉ **MARIANA123** 11 months, 1 week ago  
 "To capture any additional custom information during opportunity close, custom attributes (fields) must be added to Opportunity Close entity and their forms. "  
 Therefore for the first question the correct answer is 2  
 upvoted 1 times
- ✉ **MARIANA123** 11 months, 1 week ago  
 "To start, first open the advanced find dialog and under Look for choose Activities. Then you will want to select Activity Type equals and then choose the Opportunity Close activity type." There ore the answer is correct for number 2  
 upvoted 1 times
- ✉ **luvasgloves** 1 year ago  
 Is the 2nd answer correct?  
 upvoted 1 times
- ✉ **ceejaybee** 1 year, 2 months ago  
 No, given answer is correct, you have to update both Opportunity and Opportunity Close entities. The field in Opp Close entity that needs updating is called opportunitystatuscode (4th answer) not statuscode (3rd answer)  
 upvoted 4 times
- ✉ **estrelle2008** 1 year, 4 months ago  
 Tested: To have the new status reason automatically added to the Opportunity Quick Create Form, the answer should be "Update statuscode on Opportunity only"  
 upvoted 4 times

Bing:

To add a new status reason when an opportunity is lost, you should update the `statuscode` on both the `Opportunity` and `Opportunity Close` entities. This will allow the sales team to select the new status reason when closing an opportunity as lost, and also allow them to view the details of lost opportunities in Advanced Find. So, the correct answer is: Update `statuscode` on `Opportunity` and `Opportunity Close`. Is there anything else you would like to know? 😊

To view the details of lost opportunities in Advanced Find, you should select the `Opportunity Close` entity. This will allow you to view the details of opportunities that have been closed as lost, including the status reason for why they were lost. So, the correct answer is: Select `Opportunity Close`. Is there anything else you would like to know? 😊

## Question 86

A company uses Dynamics 365 Sales to manage sales leads.

You must create two leads. One lead must target customers between ages 30 to 40 in the oil industry. The other lead must be based on interactions with your website in the last week.

You need to set up conditions when creating the leads.

What are two categories of conditions? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

- A. Entity
- B. Date range
- C. Behaviour rules
- D. Fixed rules

Answer: CD

<https://docs.microsoft.com/en-us/dynamics365/marketing/score-manage-leads>

✉  **ceejaybee** 1 year, 2 months ago

**Selected Answer: CD**

given answer is correct

   upvoted 4 times

## Question 87

DRAG DROP -

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

You need to set up the product catalog.

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

Select and Place:

Actions	Answer Area
Add the product grid on order forms	
Create product families	
Create a unit group	
Translate product names	
Revise a product	
Add price list items	
Create price lists	

Answer:

Actions	Answer Area
Add the product grid on order forms	Create a unit group
	Create product families
	Create price lists
Translate product names	
Revise a product	Add price list items

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

 **ejsoleguim** 1 year, 2 months ago

Correct!

   upvoted 4 times

## Question 88

HOTSPOT -

A company uses Dynamics 365 Sales. The company wants qualified leads to create duplicate accounts and contacts. The company does not want to use currently available accounts or contacts because the accounts and contacts are owned by different organizational units.

You are training a new sales representative on qualifying leads. The new sales representative is unable to perform the following activities:

- Create a new account or a new contact when one already exists.
- Find notes after a lead is qualified to show the manager what was done with that account.

You need to recommend a solution.

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

NOTE: Each correct selection is worth one point.

### Answer Area

Issue	Solution
Duplicate account.	<p>Leave the Account and Contact fields blank when the duplicate dialog box appears.</p> <p>Look up the account and the contact when the duplicate dialog box appears.</p> <p>Look up the account and leave Contact blank when the duplicate dialog box appears.</p> <p>Leave the Account field blank and look up the contact when the duplicate dialog box appears.</p>
Find notes.	<p>Use Order record.</p> <p>Use Contact record.</p> <p>Use Account record.</p> <p>Use Opportunity record.</p>

Answer:

### Answer Area

Issue	Solution
Duplicate account.	<p>Leave the Account and Contact fields blank when the duplicate dialog box appears.</p> <p>Look up the account and the contact when the duplicate dialog box appears.</p> <p>Look up the account and leave Contact blank when the duplicate dialog box appears.</p> <p>Leave the Account field blank and look up the contact when the duplicate dialog box appears.</p>
Find notes.	<p>Use Order record.</p> <p>Use Contact record.</p> <p>Use Account record.</p> <p>Use Opportunity record.</p>

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

 **Newb007** 1 week, 1 day ago

"When a lead is qualified, these notes are displayed in the Opportunity record so that the information isn't lost." <https://learn.microsoft.com/en-us/dynamics365/sales/qualify-lead-convert-opportunity-sales> SCROLL TO THE BOTTOM

   upvoted 1 times

 **Newb007** 1 week, 1 day ago

Both answers are correct

   upvoted 1 times

 **Newb007** 1 week, 1 day ago

"To ignore the duplicate warning and create new records, leave the Account and Contact fields blank, and select Continue." <https://learn.microsoft.com/en-us/dynamics365/sales/qualify-lead-convert-opportunity-sales> WHAT A DUMB QUESTION TO TEST ON

   upvoted 1 times

 **Newb007** 1 week, 1 day ago

Both answers are correct

   upvoted 1 times

## Question 89

A salesperson reviews the My Activities view and discovers many open Phone Call records. You need to ensure that the salesperson can close Phone Call records without opening each record.

What should you do?

- A. Bulk Edit
- B. Deactivate
- C. Mark Complete
- D. Publish

ET User: C

✉  **inka11** 2 months, 3 weeks ago

**Selected Answer: C**

You can select multiple phone calls and then select -MARK COMPLETE it will bulk update

   upvoted 1 times

✉  **TamrynK** 3 months, 3 weeks ago

**Selected Answer: C**

Agree Mark Complete should be the correct answer. Although the edit button is available it does not allow you to edit the status

   upvoted 1 times

✉  **DS2306** 4 months ago

Mark Complete should be the correct answer

   upvoted 1 times

ET Answer: A

Bing:

The salesperson can close Phone Call records without opening each record by using the **Mark Complete** option. In Dynamics 365 Sales, you use activities to plan, track, and organize all your customer communications. For example, you can take notes, send email, make phone calls, set up appointments, and assign yourself tasks as you work a sale or resolve a service case. These actions are all considered types of activities <sup>1</sup>. When modifying an existing open Phone Call record, the Main form offers several different options. One of these options is **Mark Complete**, which saves the Phone Call record as "Completed", inactivates the record and closes the form <sup>2</sup>. So the correct answer is **C. Mark Complete**. Is there anything else I can help you with? 😊

## Question 90

DRAG DROP -

A sales manager receives a Microsoft Excel workbook that has a list of lead records. Each record includes the following information: First name, last name, company name, phone number, and email address.

You need to import the leads by using an Excel template.

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

Actions	Answer area
Download the template.	
Select <b>Data Import template</b> .	
Upload the template and choose the correct file.	
Save the file as an .xml file type.	
Add the data needed and save the file.	
Delete the first few columns.	
Select Import Data and choose the correct file.	

ET User:

1. Select Data Import Template
2. Download Template
3. Add the data needed
4. Upload the template

<https://learn.microsoft.com/en-us/power-apps/user/import-data?context=%2Fdynamics365%2Fcontext%2Fsales-context>

 **Net\_IT** Highly Voted  5 months ago

I would think:

1. Select Data Import Template
2. Download Template
3. Add the data needed
4. Upload the template

   upvoted 9 times

 **Newb007** Most Recent  1 week, 1 day ago

I would say the same but change the last step to IMPORT as per link... tricky wording... MS is so silly. <https://learn.microsoft.com/en-us/power-apps/user/import-data?context=%2Fdynamics365%2Fcontext%2Fsales-context>

1. Select DATE IMPORT Template
2. Download Template
3. Add the data needed
4. Select Import Data and choose the correct file

   upvoted 2 times

ET Answer:

**Answer area**

Add the data needed and save the file.
Select <b>Data Import template</b> .
Download the template.
Select Import Data and choose the correct file.

Bing:

To import leads from an Excel workbook into Dynamics 365 Sales, you can follow these steps:

1. **Download the template:** In Dynamics 365 Sales, you can download an Excel template for importing data. This template will have the necessary columns and formatting for importing leads into Dynamics 365 Sales [1](#).
2. **Add the data needed and save the file:** Once you have downloaded the template, you can add the lead data from the Excel workbook you received into the template. Make sure to match the columns in the template with the corresponding data in the workbook. After adding the data, save the file [1](#).
3. **Select Import Data and choose the correct file:** In Dynamics 365 Sales, navigate to the Import Data wizard. From there, you can select the option to import data and choose the Excel file that you saved in the previous step [1](#).
4. **Upload the template and choose the correct file:** Follow the prompts in the Import Data wizard to upload your Excel file and choose the correct file for importing your leads [1](#).

So, in sequence, you should perform these four actions: Download the template, Add the data needed and save the file, Select Import Data and choose the correct file, Upload the template and choose the correct file. Is there anything else I can help you with? 😊

## Question 91

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.

### Answer Area

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

Answer:

### Answer Area

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

 **Newb007** 1 week, 1 day ago

CORRECTO

   upvoted 2 times

## Question 92

A company uses Dynamics 365 Sales. The company does not use any custom views or forms.

You select a customer and create an appointment for the next day.

You need to find the appointment.

Which two places will display the appointment? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

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

ET User: AC

  Net\_IT  5 months ago

**Selected Answer: AC**

I think AC

   upvoted 6 times

  CE\_Team\_Gold  1 month, 2 weeks ago

Agree A and C ist correct

   upvoted 1 times

ET Answer: AD

Bing:

In Dynamics 365 Sales, you can use activities to plan, track, and organize all your customer communications. For example, you can take notes, send email, make phone calls, set up appointments, and assign yourself tasks as you work a sale or resolve a service case. These actions are all considered types of activities <sup>1</sup>. You can find your activities under **My Work** in the site map <sup>1</sup>. So, the appointment you created for the next day will be displayed in the **My Activities view**. Therefore, the correct answer is **A. My Activities view**.

Another place where the appointment will be displayed is the **Account Timeline feed**. The timeline control provides a quick way to view and interact with the activities, posts, and notes for a particular record <sup>2</sup>. So, if you select a customer and create an appointment for the next day, it will be displayed in the Account Timeline feed of that customer. Therefore, another correct answer is **C. Account Timeline feed**.

## Question 93

You are creating a forecast.

You want to include only opportunities that sell more than 100 units.

You need to configure this within the system.

What should you configure?

- A. multiple columns
- B. premium forecasting
- C. advanced features
- D. additional filters
- E. separate views

Answer: D

<https://learn.microsoft.com/en-us/dynamics365/sales/add-additional-filters>

✉️👤 Newb007 1 week, 1 day ago

Yea Boi. <https://learn.microsoft.com/en-us/dynamics365/sales/add-additional-filters> correct

👍👎FLAG upvoted 2 times

Bing:

To include only opportunities that sell more than 100 units in a forecast, you should configure **additional filters**. In Dynamics 365 Sales, you can configure forecasts that are based on revenue or quantity. You define the type of forecast, the hierarchy, access permissions, and the details you want to see in the forecast grid <sup>1</sup>. After a forecast is activated, your sales team can view the revenue or quantity and pipeline projections <sup>1</sup>. By configuring additional filters, you can specify the criteria for the opportunities that should be included in the forecast. So, the correct answer is D.

**additional filters**. Is there anything else I can help you with? 😊

## Question 94

A sales manager creates a marketing list that includes all contacts from a specific city. The manager plans to use the list in a campaign.

The manager forgot to filter out contacts who have a credit hold.

You need to create a campaign with the updated contacts.

What should you do?

- A. Copy the original marketing list to static and remove the contacts by using Advanced Find. Add both marketing lists to the campaign.
- B. Remove the contacts from the marketing list by using Advanced Find. Then add the marketing list to the campaign.
- C. Create a new dynamic marketing list by using different purpose and source fields. Then add both marketing lists to the campaign.
- D. Remove the contacts from the marketing list by using a Lookup. Then add the marketing list to the campaign.

ET User: B

 **HassanSiddiqui** 12 hours, 5 minutes ago

I think it should be A as it has asked to just filter out the contact not to exclude from marketing list

   upvoted 1 times

 **TamrynK** 3 months, 3 weeks ago

**Selected Answer: B**

I think B should be the correct answer as it makes no sense to include the incorrect list in the campaign.

   upvoted 3 times

 **DS2306** 4 months ago

**Selected Answer: B**

In My opinion it has to be B  
it makes no sense to add both marketing lists

   upvoted 3 times

ET Answer: A

Bing:

The correct answer is B. Remove the contacts from the marketing list by using Advanced Find. Then add the marketing list to the campaign. This will allow the manager to remove the contacts who have a credit hold from the original marketing list and then use the updated list in the campaign. This is the most efficient and straightforward way to achieve the desired result.

## Question 95

HOTSPOT -

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

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

You need to create the role.

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

NOTE: Each correct selection is worth one point.

### Answer Area

Criterion	Setup
Role type	<div style="border: 1px solid #ccc; padding: 5px;"><input type="checkbox"/> Resource role <input type="checkbox"/> Connection role <input type="checkbox"/> Relationship role</div>
Role category	<div style="border: 1px solid #ccc; padding: 5px;"><input type="checkbox"/> Sales <input type="checkbox"/> Business <input type="checkbox"/> Sales team <input type="checkbox"/> Stakeholder</div>

ET User:

Role Type: Connection role;

Role Category: Stakeholder (influencer is a stakeholder)

<https://learn.microsoft.com/en-us/dynamics365/sales/add-stakeholder>

  **Newb007** 1 week, 1 day ago

chyea. <https://learn.microsoft.com/en-us/dynamics365/sales/add-stakeholder>

   upvoted 1 times

  **Newb007** 1 week, 1 day ago

WHAT HE SAID

Role Type: Connection role;

Role Category: Stakeholder (influencer is a stakeholder)

   upvoted 2 times

  **1d7136c** 2 months ago

Role Type: Connection role;

Role Category: Stakeholder (influencer is a stakeholder).

   upvoted 1 times

ET Answer:

## Answer Area

### Criterion

Role type

### Setup

Resource role
Connection role
Relationship role

Role category

Sales
Business
Sales team
Stakeholder

Bing:

To create a new role named "influencer" for tracking external individuals who influence an opportunity, the sales manager should configure the system with the **Role Category** set to **Stakeholder**. This will allow the manager to identify and track these individuals as stakeholders in the opportunity.

## Question 96

HOTSPOT -

A salesperson closes an opportunity for a customer as lost. The customer reconsiders and asks the salesperson to create an invoice for the opportunity.

The salesperson wants an invoice that meets the following requirements:

- Create the invoice without making changes to the original opportunity.
- Add tax to the invoice.

You need to create the invoice.

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

NOTE: Each correct selection is worth one point.

### Answer Area

Requirement	Action
Create the invoice.	<p>Create an invoice from the closed opportunity.</p> <p>Create a new invoice and use Add Products to add products from the opportunity.</p> <p>Create a new invoice and use Get Products to add products from an opportunity.</p> <p>Create a quote from the closed opportunity and then create the invoice from the quote.</p>
Add tax to the invoice.	<p>Add a tax percent on the invoice.</p> <p>Add a tax amount on the invoice.</p> <p>Add a tax percent on each product line.</p> <p>Add a tax amount on each product line.</p>

Answer: 第二个有争议，可能选 3

### Answer Area

Requirement	Action
Create the invoice.	<p>Create an invoice from the closed opportunity.</p> <p>Create a new invoice and use Add Products to add products from the opportunity.</p> <p><span style="border: 2px solid red;">Create a new invoice and use Get Products to add products from an opportunity.</span></p> <p>Create a quote from the closed opportunity and then create the invoice from the quote.</p>
Add tax to the invoice.	<p><span style="border: 2px solid red;">Add a tax percent on the invoice.</span></p> <p><span style="border: 2px solid red;">Add a tax amount on the invoice.</span></p> <p>Add a tax percent on each product line.</p> <p>Add a tax amount on each product line.</p>

 **Pirozhok** 4 months, 1 week ago

Add a tax amount on the invoice is not possible for me.

Tax fields were locked. So I had to go to the product record and add tax there. Then it was included in the invoice.

   upvoted 4 times

## Question 97

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.

### Answer Area

#### Requirement

How many forecasts are needed?

#### Configuration

1
3
4
5

What is the starting period for the forecast?

current year
next year
last year of the forecast
last open year

How many periods are needed?

12
36
48
60

ET User:

3

Current year

12

 **TamrynK** 3 months, 3 weeks ago

I think for the first the answer is 3 due to the answer for the last.

For the year I would say current as the year starts in January so it would be the current year.

With regards to the last the maximum number of periods I can set is 12 when using monthly for the period.

   upvoted 2 times

ET Answer:

## Answer Area

### Requirement

How many forecasts are needed?

### Configuration

1
3
4
5

What is the starting period for the forecast?

current year
next year
last year of the forecast
last open year

How many periods are needed?

12
36
48
60

## Question 98

HOTSPOT -

A company generates leads from a web form. Salespeople manage leads by country/region. All salespeople are part of the same Dynamics 365 Sales team.

The sales manager requires the following functionality:

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

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

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

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

NOTE: Each correct selection is worth one point.

### Answer Area

#### Requirement

#### Configuration

Filter leads for assignment.

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

Assign the country/region to the correct group.

Assign the country/region to any seller.  
Assign the country/region to specific teams.  
Assign the country/region to specific sellers.  
Assign the country/region to sellers with matching attributes.

Distribute leads to salespeople.

Use load balancing.  
Use round-robin distribution.

Answer: 有争议，就一个评论。

### Answer Area

#### Requirement

#### Configuration

Filter leads for assignment.

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

Assign the country/region to the correct group.

Assign the country/region to any seller.  
Assign the country/region to specific teams.  
Assign the country/region to specific sellers.  
Assign the country/region to sellers with matching attributes.

Distribute leads to salespeople.

Use load balancing.  
Use round-robin distribution.

<https://learn.microsoft.com/en-us/dynamics365/sales/wa-create-and-activate-assignment-rule>

- ✉️👤 **Newb007** 1 week, 1 day ago  
2. 3. 1 <https://learn.microsoft.com/en-us/dynamics365/sales/wa-create-and-activate-assignment-rule>  
👍 ↵ ⚡ upvoted 1 times
- ✉️👤 **Newb007** 1 week, 1 day ago  
2. 4. 1. wooops !!!  
👍 ↵ ⚡ upvoted 1 times

## Question 99

HOTSPOT -

A company enables sales accelerator in Microsoft Dynamics 365 Sales. All salespeople use a custom customer form.

A salesperson observes that a worklist displays TaskA instead of Task B for a customer.

The salesperson requires the following setup:

- Display only Tasks in the worklist.
- View the task on the customer record as a visual cue.

You need to recommend changes to meet the requirements.

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

### Answer Area

Requirement	Action
Display only Tasks in the worklist.	<p>Sort the work items. Filter the work items. Change the due date of TaskA to be before TaskB. Change the due date of TaskB to be before TaskA.</p>
View the task on the customer record.	<p>Add the Up next widget. Add the Up next widget. Add the Timeline control. Add the assistant widget.</p>

Answer:

### Answer Area

Requirement	Action
Display only Tasks in the worklist.	<p>Sort the work items. Filter the work items. Change the due date of TaskA to be before TaskB. Change the due date of TaskB to be before TaskA.</p>
View the task on the customer record.	<p>Add the Up next widget. Add the Up next widget. Add the Timeline control. Add the assistant widget.</p>

<https://learn.microsoft.com/en-us/dynamics365/sales/add-upnext-widget-form>.  
<https://learn.microsoft.com/en-us/dynamics365/sales/manage-activities>

 **Newb007** 1 week, 1 day ago

HAD A TOUGH TIME CHOOSING BETWEEN "ADD THE UP NEXT WIDGET" AND "ADD THE UP NEXT WIDGET". BUT I THINK IT MAKES MOST SENSE TO GO WITH "ADD THE UP NEXT WIDGET". <https://learn.microsoft.com/en-us/dynamics365/sales/add-upnext-widget-form>. <https://learn.microsoft.com/en-us/dynamics365/sales/manage-activities>

   upvoted 1 times

 **Newb007** 1 week, 1 day ago

ANSWERS ARE CORRECT

   upvoted 1 times

## Question 100

You manage a Dynamics 365 environment. A user named User1 begins work on an opportunity.

User1 asks a user named User2 to assist with the opportunity while she is on vacation.

You need to ensure that User2 can access the opportunity and that User1 retains ownership of the opportunity.

What should you do?

- A. Grant User2 the stakeholder role.
- B. Share the record with User2.
- C. Instruct User2 to follow the record.
- D. Add User2 to the Owner team.

Answer: B, 重复题

  **Newb007** 1 week, 1 day ago

ACCESS TEAM IS BETTER BUT THIS WILL DO I GUESS. its good

   upvoted 1 times

Bing: B

To ensure that User2 can access the opportunity while User1 retains ownership of the opportunity, you should **Share the record with User2**. This will allow User2 to access and work on the opportunity while User1 is on vacation, while still ensuring that User1 retains ownership of the opportunity. Sharing the record with User2 will provide the necessary level of access and collaboration without changing the ownership of the opportunity.

## Question 101

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.

### Answer Area

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

Answer:

### Answer Area

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

<https://learn.microsoft.com/en-us/dynamics365/sales/price-calculation-opportunity-quote-order-invoice-records>

<https://learn.microsoft.com/en-us/dynamics365/sales/add-stakeholder>

 **Newb007** 1 week, 1 day ago

Price calculation when price list is mandatory versus optional

Price calculations depend on whether a price list is mandatory while adding products or whether your organization has made price lists optional.

When price list is mandatory, price calculation won't happen if:

You haven't selected a price list on the opportunity, quote, order, or invoice records.

You've selected a price list on the opportunity, quote, order, or invoice record, but you're adding a product that doesn't belong to the selected price list.

You've selected a price list on the opportunity, quote, order, or invoice record, but:

The price list item for the product's default price list isn't present.

The currency of the product's default price list doesn't match the currency on the quote product, order product, or invoice product. <https://learn.microsoft.com/en-us/dynamics365/sales/price-calculation-opportunity-quote-order-invoice-records>

   upvoted 1 times

 **Newb007** 1 week, 1 day ago

looks good <https://learn.microsoft.com/en-us/dynamics365/sales/add-stakeholder>

   upvoted 1 times

## Question 102

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

ET User: D

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

✉️  **EEM** 3 weeks, 2 days ago

**Selected Answer: D**

I think Rounding Policy

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

   upvoted 1 times

✉️  **Pat4** 3 weeks, 4 days ago

I think Rounding Policy

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

   upvoted 2 times

ET Answer: A

Bing: D

To establish the pricing requirement that all prices must end in .98 in Dynamics 365 Sales, you should use the 'Rounding Policy' option. The 'Rounding Policy' allows you to define how prices are rounded and can be used to ensure that all prices end in a specific value, such as .98. So, the correct answer is: D. Rounding Policy..

## Question 103

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?

- Amount
- Discount List
- Price List
- Quantity Selling Option

Answer: D

✉️  **chloaus** 2 days, 12 hours ago

Correct. Set the Quantity Selling option to Whole and Fractional for the required price list item,

   upvoted 1 times

Bing: D

To resolve the issue of the customer receiving a system error when trying to enter a quantity of 2.5 cases, you should modify the **Quantity Selling Option**. The Quantity Selling Option determines whether partial quantities are allowed for a product. If partial quantities are not allowed, the customer will receive an error when trying to enter a non-integer quantity. To allow partial quantities, you need to set the Quantity Selling Option to "Allow Partial Quantities" for the product in question. So, the correct answer is D. Quantity Selling Option. Is there anything else you would like to know?

# Common Question 3

## Question 1

HOTSPOT -

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

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

You need to configure the forecast.

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

NOTE: Each correct selection is worth one point.

Hot Area:

### Answer Area

Step	Configuration
Configure a relationship definition.	<input type="checkbox"/> account <input type="checkbox"/> opportunity <input type="checkbox"/> contact <input type="checkbox"/> product
Select the top of the hierarchy.	<input type="checkbox"/> customer name <input type="checkbox"/> main event record <input type="checkbox"/> parent opportunity field <input type="checkbox"/> opportunity entity

Answer:

### Answer Area

Step	Configuration
Configure a relationship definition.	<input checked="" type="checkbox"/> account <input checked="" type="checkbox"/> opportunity <input checked="" type="checkbox"/> contact <input checked="" type="checkbox"/> product
Select the top of the hierarchy.	<input checked="" type="checkbox"/> customer name <input checked="" type="checkbox"/> main event record <input checked="" type="checkbox"/> parent opportunity field <input checked="" type="checkbox"/> opportunity entity

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

 **HassanSarhan**  1 year, 9 months ago

Use this model to create a product-based revenue forecast.

For product-based forecasting, the product level revenue comes from the Opportunity Product entity. Therefore, Opportunity Product must be selected as the rollup entity and Product as the hierarchy entity that has a direct relationship with the Opportunity Product rollup entity.

So Answer is correct

   upvoted 8 times

 **AndreaDP** 1 year, 7 months ago

Not sure actually about the top of the hierarchy response. That should be a record instance not a record type. If the hierarchy is related to a custom table "events" it should be the main event record.

   upvoted 2 times

 **ceejaybee**  1 year, 2 months ago

In exam, Jun-22

   upvoted 2 times

## Question 2

HOTSPOT -

A company is implementing Dynamics 365 Sales.

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

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

NOTE: Each correct selection is worth one point.

Hot Area:

**Answer Area**

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

Answer:

**Answer Area**

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

<https://docs.microsoft.com/en-us/power-virtual-agents/fundamentals-what-is-power-virtual-agents>

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

<https://docs.microsoft.com/en-us/power-virtual-agents/advanced-hand-off>

- ✉  **AAR75** 1 year, 3 months ago  
how is question 3 sales insights?  
   upvoted 2 times
- ✉  **AAR75** 1 year, 3 months ago  
given answers are correct  
   upvoted 1 times
- ✉  **mrejay** 1 year, 6 months ago  
looks correct  
   upvoted 2 times

## Question 3

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

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

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

NOTE: Each correct answer is worth one point.

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

Answer: BC

<https://docs.microsoft.com/en-us/dynamics365/sales/scan-business-cards>

<https://powerobjects.com/powerapps/uploading-a-photo-from-a-canvas-app-to-dynamics-365-as-an-attachment/>

✉️ moodi86 1 year, 7 months ago

BD:  
only dynamics sales: <https://docs.microsoft.com/en-us/dynamics365/sales/scan-business-cards>  
or Canvas App with AI Builder

Otherwise, you cannot simply use a flow button to scan card, there should be an App interface  
 upvoted 1 times

✉️ bitm100 1 year, 8 months ago

By elimination, makes sense to chose BC  
 upvoted 1 times

✉️ ChandanKC 1 year, 9 months ago

Please can someone explain why B&C has been marked as answer?  
 upvoted 3 times

✉️ zukito3 1 year, 8 months ago

Hello ChandanKC,

The option Ai builder + Power automate maybe correct because with ai builder you can extract data and then use a flow to create a new opportunity with that data.

<https://powerobjects.com/powerapps/uploading-a-photo-from-a-canvas-app-to-dynamics-365-as-an-attachment/>

upvoted 3 times

Bing: BC

Based on the information I have, I couldn't find any specific information about using photos of opportunity notes as input for new opportunities in Dynamics 365 Sales. However, you may be able to achieve this goal by using **AI Builder** with **Power Automate instant flow** or a **Canvas App** with a **flow button**. These options would allow you to create a custom solution that uses AI Builder to extract text from the photo and then use Power Automate or a Canvas App to create a new opportunity in Dynamics 365 Sales with the extracted information. It's important to note that this is just a suggestion and you may want to consult with a Dynamics 365 Sales expert or Microsoft support for more information on this topic. Is there anything else I can help you with? 😊

## Question 4

A company uses Dynamics 365 Sales. The company uses their organizational structure to determine how to aggregate forecasts for each year.

The company divides a business unit into three separate units. Each unit will have a new manager.

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

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

NOTE: Each correct selection is worth one point.

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

ET User: CF, 就一个评论， ET & Bing 给的都是 DF

  AhmedGad 3 months, 3 weeks ago

**Selected Answer: CF**

I would Choose C&F

   upvoted 1 times

ET Answer: DF

<https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/activate-upload-simple-columns-data-forecast>

<https://syncratec.com/how-to-set-up-a-dynamics-365-sales-forecast-model-part-1/>

Bing:

To update the quotas for each user for the current fiscal year's forecast in Dynamics 365 Sales, you need to perform the following two actions: **F. Assign the users to their new managers** and **D. Upload the new quota amounts for each user** <sup>1</sup>.

Since the company has divided the business unit into three separate units, each with a new manager, you need to ensure that each user is assigned to their respective manager. This will ensure that each manager can view and manage the sales forecasts of their team members. To assign users to their new managers, follow these steps:

1. Go to the Sales Hub app and select "Users" from the left-hand menu.
2. Select the user whose manager needs to be updated.
3. In the "Manager" field, select the new manager from the dropdown list.
4. Save your changes.

Once the users have been assigned to their respective managers, you need to update the quota amounts for each user for the current fiscal year's forecast. To do this, you can upload a new quota file for each user or update the quota values directly in Dynamics 365 Sales. Follow these steps to update the quota amounts for each user:

1. Go to the Sales Hub app and select "Forecasts" from the left-hand menu.
2. Select the forecast you want to update.
3. Click on the "Quotas" tab.
4. Update the quota values for each user either by directly editing them or uploading a new quota file.
5. Save your changes.

Creating and assigning users to new resource groups for each manager (A), creating a new relationship between sites (B), updating the target goal amount for each user (C), or adjusting the forecast values directly (E) are not recommended solutions to update the quotas for each user <sup>1</sup>. Is there anything else I can help you with? 😊

## Question 5

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

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

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

What should you do?

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

Answer: A

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

✉️ loulou2105 1 year, 8 months ago

Why not B ?

👍👎FLAG upvoted 1 times

✉️ Sabineka 1 year, 8 months ago

I think A is correct because the owner of the company wants the manager to be able to UPDATE the forecast, option B provides read-only access to this forecast to all the security roles of users in your organization, but A allows you to specify which security roles will receive either read-only access, or read-only and adjustment access within this forecast.

👍👎FLAG upvoted 7 times

✉️ loulou2105 1 year, 8 months ago

Thanks for the insights! :)

👍👎FLAG upvoted 1 times

Bing:

To allow users to see the forecasts for every region in Dynamics 365 Sales, you should **B. Grant all security roles access in the forecast configuration** <sup>1</sup>. This will allow all current and future employees to view the forecasts for every region.

After you've selected general properties and scheduled your forecast, you can define who can view, access, and share it. Use the Permissions step to define the owner of the forecast and provide access to users who have specific security roles to view the forecast <sup>1</sup>. By granting all security roles access in the forecast configuration, you can ensure that all users have permission to view the forecasts for every region.

Adding each security role to the forecast configuration (A), adding the view privilege to each user's security role ©, or granting users' permission to view the Forecast Category field (D) are not recommended solutions to allow users to see the forecasts for every region <sup>1</sup>. Is there anything else I can help you with? 😊

## Question 6

You are a salesperson using Dynamics 365 Sales.

An invoice needs to be created on an order. The Create Invoice button is not visible.

You need to determine why the Create Invoice button is not visible.

Why is the button missing?

- A. The sales order is not complete.
- B. The price list has expired.
- C. The sales order processing integration is enabled.
- D. You have not selected the Get Products button.

Answer: C

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

<https://docs.microsoft.com/en-us/troubleshoot/dynamics-365/sales/troubleshoot-orders-issues>

✉  **Gosaisnehal** 1 year, 3 months ago

**Selected Answer: C**

<https://docs.microsoft.com/en-us/troubleshoot/dynamics-365/sales/troubleshoot-orders-issues>

   upvoted 1 times

✉  **An01234** 1 year, 4 months ago

On exam.

   upvoted 2 times

✉  **mrejay** 1 year, 7 months ago

Correct.

   upvoted 2 times

Bing:

The Create Invoice button may not be visible on an order in Dynamics 365 Sales because **C. The sales order processing integration is enabled** <sup>1</sup>. When the sales order processing integration is enabled, it connects Dynamics 365 Sales with an external, back-office order-processing application. This allows a sales order created in Dynamics 365 Sales to be submitted and then synchronized with an external order processing application, where the lifecycle of the order continues. As a result, when the sales order processing integration is enabled, users don't see the Create Invoice button on order records <sup>1</sup>.

The sales order not being complete (A), the price list having expired (B), or not having selected the Get Products button (D) are not reasons why the Create Invoice button would not be visible on an order in Dynamics 365 Sales <sup>1</sup>. Is there anything else I can help you with? 😊

## Question 7

A company measures their sales team on the number of appointments they make in a fiscal year.

The company needs to be able to track how many appointments have been scheduled by each salesperson.

You need to ensure the sales representatives are achieving their appointment targets.

What should you configure?

- A. A goal for each salesperson with metric type to set to amount for number of appointments made
- B. A goal for each salesperson with metric type set to count for each customer
- C. A goal for each salesperson with metric type set to count for number of appointments made
- D. A view with the revenue for each salesperson
- E. A view with the appointments for each salesperson

Answer: C

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

✉️  **Zarima** 5 months, 3 weeks ago

Can somebody explain me why isn't A?

   upvoted 1 times

✉️  **Net\_IT** 5 months ago

Because the number of appointments is counted with the count metric, not amount metric.

   upvoted 2 times

✉️  **loulou2105** 1 year, 8 months ago

Correct

   upvoted 2 times

Bing:

The correct answer is C. **A goal for each salesperson with metric type set to count for number of appointments made.** This will allow the company to track the number of appointments made by each salesperson and ensure that they are meeting their targets. The other options do not accurately measure the number of appointments made by each salesperson. Option A measures the amount of appointments, but not the count. Option B measures the count of customers, not appointments. Option D measures revenue, not appointments. Option E provides a view of appointments, but does not measure them against a target.

## Question 8

You are implementing Dynamics 365 Sales Insights for a company.

Sales team members must be able to view information about customers that have made purchases before and who will most likely purchase products again.

You need to set up this functionality.

What should you configure?

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

ET User: B/A

✉ ceejaybee 1 year, 2 months ago

A variation of this question is in exam, Jun-22

1 like, 1 share, 1 flag upvoted 3 times

✉ ceejaybee 1 year, 2 months ago

Selected Answer: A

A, as it seems Relationship Analytics is part of Sales Insights package (which is mentioned in question), but Customer Insights is not.

1 like, 1 share, 1 flag upvoted 2 times

✉ Gosaishnehal 1 year, 3 months ago

Selected Answer: A

<https://docs.microsoft.com/en-us/dynamics365/customer-insights/overview>

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

1 like, 1 share, 1 flag upvoted 2 times

✉ debchoe 1 year, 4 months ago

Isn't the correct answer B - Customer Insights?

1 like, 1 share, 1 flag upvoted 4 times

✉ AAR75 1 year, 4 months ago

I agree with you. This is understanding customer behavior

1 like, 1 share, 1 flag upvoted 1 times

ET Answer: A

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

<https://docs.microsoft.com/en-us/dynamics365/customer-insights/overview>

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

Bing: B

The correct answer is **B. Customer Insights**. Dynamics 365 Customer Insights is an AI-powered customer data platform that can help sales team members view information about customers that have made purchases before and who will most likely purchase products again<sup>1</sup>. Relationship analytics, Sales accelerator, and Power Automate are all useful tools within Dynamics 365, but they do not provide the specific functionality described in the question.

Relationship analytics helps analyze the health of customer relationships<sup>2</sup>, Sales accelerator helps sellers view and work on insights<sup>3</sup>, and Power Automate is a tool for creating automated workflows between apps and services.

## Question 9

DRAG DROP -

You are configuring Dynamics 365 Sales Insights.

You need to configure the system to meet the following requirements:

- ☞ Use artificial intelligence (AI) to rate all open leads on whether they will convert to an opportunity.
- ☞ Use AI to improve expected future sales numbers over the fiscal year.
- ☞ Create a sequence of activities for each lead to help the salespeople improve sales.

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

NOTE: Each correct selection is worth one point.

Select and Place:

### Answer Area

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

Answer:

### Answer Area

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

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

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

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

 Net\_IT 5 months ago

Seems correct to me

   upvoted 2 times

## Question 10

HOTSPOT -

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

Preview								
Territory	Quota	Manager	Best case	Committed	Lost	Omitted	Pipeline	Won
C City	[bar]	[bar]	[bar] 0	[bar] 0	[bar]	[bar]	[bar]	[bar] 75%
S South	[bar]	[bar]	[bar] 0	[bar] 0	[bar]	[bar]	[bar]	[bar] 75%
N North	[bar]	[bar]	[bar] 0	[bar] 0	[bar]	[bar]	[bar]	[bar] 75%

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

NOTE: Each correct selection is worth one point.

Hot Area:

### Answer Area

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

Forecast Category option set
Forecast view
Layout column settings
Preview grid

Where should you delete the Lost column for this forecast?

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

Answer:

## Answer Area

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

Forecast Category option set
Forecast view
Layout column settings
Preview grid

Where should you delete the Lost column for this forecast?

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

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

 **ceejaybee** 1 year, 2 months ago

In exam, Jun-22 (similar question, not exactly the same)

   upvoted 2 times

## Question 11

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

The sales manager wants the value of the Lost column to come from the Total Detail Amount instead of the default value because the revenue is always driven by the items.

You need to make the change.

What should you do?

- A. Edit the existing forecast, remove the Lost column, and add a new calculated column.
- B. Create a new forecast and update the Amount field in the layout.
- C. Create a new forecast, remove the Lost column, and add a new calculated column.
- D. Edit the existing forecast and update the Amount field in the layout.

Answer: A

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

 **hjs16** 8 months, 3 weeks ago

Why not D?

   upvoted 1 times

Bing:

To change the value of the Lost column to come from the Total Detail Amount instead of the default value, you should

**A. Edit the existing forecast, remove the Lost column, and add a new calculated column.** This can be done by going to the Layout step of the forecast configuration and configuring the columns to define the forecast grid that appears for users <sup>1</sup>. You can remove the Lost column and add a new calculated column that uses the Total Detail Amount as its source. The other options do not accurately describe how to make this change. Option B and D involve updating the Amount field in the layout, but this does not address changing the source of the Lost column. Option C involves creating a new forecast, but it is not necessary to create a new forecast to make this change; you can edit the existing forecast.

## Question 12

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	Requirement	Component
Assistant		Provide a salesperson with up-to-date information on email, meetings, and more in Dynamics 365	
Auto capture		Retrieve information from emails about customers in Dataverse without manual data entry	
Email engagement		Track read receipts to customers in Dataverse	
Relation analytics			

Answer:

Components	Answer Area	Requirement	Component
Assistant		Provide a salesperson with up-to-date information on email, meetings, and more in Dynamics 365	Assistant
Auto capture		Retrieve information from emails about customers in Dataverse without manual data entry	Auto capture
Email engagement		Track read receipts to customers in Dataverse	Email engagement
Relation analytics			

<https://msdynamicsworld.com/story/improve-sales-ai-microsoft-dynamics-365>

✉  **ceejaybee** 1 year, 2 months ago

In exam, Jun-22 (similar question, not exactly the same)

   upvoted 2 times

✉  **Jurka** 1 year, 3 months ago

Seems correct

   upvoted 1 times

## Question 13

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.

NOTE: Each correct selection is worth one point.

Select and Place:

Fields	Answer Area						
Actual Value and Actual Close Date	<table border="1"><thead><tr><th>Requirement</th><th>Field</th></tr></thead><tbody><tr><td>Closed opportunities</td><td></td></tr><tr><td>Open opportunities</td><td></td></tr></tbody></table>	Requirement	Field	Closed opportunities		Open opportunities	
Requirement	Field						
Closed opportunities							
Open opportunities							
Estimated Value and Estimated Close Date							
Actual Value, Actual Close Date, Estimated Value, and Estimated Close Date							

Answer:

Fields	Answer Area						
Actual Value and Actual Close Date	<table border="1"><thead><tr><th>Requirement</th><th>Field</th></tr></thead><tbody><tr><td>Closed opportunities</td><td>Actual Value, Actual Close Date, Estimated Value, and Estimated Close Date</td></tr><tr><td>Open opportunities</td><td>Estimated Value and Estimated Close Date</td></tr></tbody></table>	Requirement	Field	Closed opportunities	Actual Value, Actual Close Date, Estimated Value, and Estimated Close Date	Open opportunities	Estimated Value and Estimated Close Date
Requirement	Field						
Closed opportunities	Actual Value, Actual Close Date, Estimated Value, and Estimated Close Date						
Open opportunities	Estimated Value and Estimated Close Date						

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

## Question 14

A company implements Dynamics 365 Sales.

The company has the following requirements:

- ☞ Employees must have quarterly goals. The goals must calculate all deals won by quarter for each goal.

- ☞ Managers must be able to look at the goals and calculations any time.

The solution must use goal features without customization.

You need to create the calculation.

What should you configure?

- A. Rollup query
- B. Goal metric
- C. Rollup entity
- D. Drill-down entity

Answer: A

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

✉ ramberry 1 year, 2 months ago

Selected Answer: A

Correct "you could create a goal metric that measures all invoices closed within a specific period. You could then create a rollup query to show invoices that are owned by a person, or raised for customers in a territory"

Like 0 Upvote 2 times

✉ MARIANA123 11 months, 2 weeks ago

Why is it not A?

Like 0 Upvote 2 times

Bing:

To create the calculation for the company's requirements, you should configure a **Goal Metric**. A goal metric is used to track things like revenue or sales measured in something other than whole numbers. This metric is more versatile and can be used to track sales of a product sold by weight, or to make a goal more specific, such as the number of sales calls that lasted longer than five minutes, instead of only the total number of calls made <sup>1</sup>. Managers can monitor goals and understand goals and security roles with Dynamics 365 Sales <sup>1</sup>. So, the correct answer is **B. Goal metric**. Is there anything else you would like to know? 😊

## Question 15

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
Dynamic 365 Sales records to Sales Navigator	<div style="border: 1px solid black; padding: 5px;"><p>▼</p><p>Contacts and Leads</p><p>Accounts and Leads</p><p>Accounts and Contacts</p></div>
Sales Navigator records to Dynamic 365 Sales	<div style="border: 1px solid black; padding: 5px;"><p>▼</p><p>InMails, posts, and news</p><p>Messages, notes, and news</p><p>Messages, posts, and notes</p><p>InMails, messages, and notes</p></div>

Bing:

Accounts and Contacts.

InMails, Messages, and Notes.

To configure synchronization settings for the Microsoft Relationship Sales Solution, you should configure **Accounts and Contacts**. The Microsoft Relationship Sales Solution integrates Dynamics 365 Sales with LinkedIn Sales Navigator. This integration allows you to synchronize Accounts and Contacts between the two systems, so that you can see the same information in both places. Is there anything else you would like to know? 😊

To configure synchronization settings for Sales Navigator records to Dynamics 365 Sales, you should configure **InMails, Messages, and Notes**. By connecting Microsoft Dynamics 365 Sales with LinkedIn Sales Navigator via CRM Sync, you can access key CRM-powered integrations, including Activity Writeback. Activity Writeback automatically logs key Sales Navigator activities such as InMails, Messages, and Notes to CRM. Is there anything else you would like to know? 😊

✉️  **Pirozhok** 4 months, 1 week ago

A confusing question.

I opened the link attached:

Auto-Save: Import and save CRM Leads, Contact, and Accounts in user's Sales Navigator Lists.

Activity Writeback: Automatically log key Sales Navigator activities (i.e., InMails, Messages, Notes,) to CRM.

For the 2nd question it's okay...But for the first one...We don't even have an option Lead, Acc, Con

   upvoted 2 times

✉️  **Net\_IT** 5 months ago

I would also choose the given answers

   upvoted 1 times

ET Answer:

### Answer Area

Records to synchronize	Synchronization attribute					
Dynamic 365 Sales records to Sales Navigator	<table border="1"><tr><td>▼</td></tr><tr><td>Contacts and Leads</td></tr><tr><td>Accounts and Leads</td></tr><tr><td>Accounts and Contacts</td></tr></table>	▼	Contacts and Leads	Accounts and Leads	Accounts and Contacts	
▼						
Contacts and Leads						
Accounts and Leads						
Accounts and Contacts						
Sales Navigator records to Dynamic 365 Sales	<table border="1"><tr><td>▼</td></tr><tr><td>InMails, posts, and news</td></tr><tr><td>Messages, notes, and news</td></tr><tr><td>Messages, posts, and notes</td></tr><tr><td>InMails, messages, and notes</td></tr></table>	▼	InMails, posts, and news	Messages, notes, and news	Messages, posts, and notes	InMails, messages, and notes
▼						
InMails, posts, and news						
Messages, notes, and news						
Messages, posts, and notes						
InMails, messages, and notes						

<https://business.linkedin.com/sales-solutions/sales-navigator-customer-hub/resources/ms-dynamics-sync-activity-writeback>

## Question 16

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.

### Answer Area

Required association	Action
Corporate office to a subsidiary	<p>Add a child account.</p> <p>Add a parent account.</p> <p>Create a parental relationship.</p> <p>Create a referential relationship.</p>
Individuals to companies	<p>Add a child account.</p> <p>Add a parent account.</p> <p>Create a parental relationship.</p> <p>Create a referential relationship.</p>
Parents to their children	<p>Add a child account.</p> <p>Add a parent account.</p> <p>Create a parental relationship.</p> <p>Create a referential relationship.</p>

ET User:

- 1) Add a parent account
- 2) Create a referential relationship
- 3) Create a parental relationship

<https://learn.microsoft.com/en-us/dynamics365/customerengagement/on-premises/customize/create-and-edit-1n-relationships?view=op-9-1>

df14ce0 5 months, 1 week ago  
1) parent account  
2) referential relationship  
3) parental relationship  
<https://learn.microsoft.com/en-us/dynamics365/customerengagement/on-premises/customize/create-and-edit-1n-relationships?view=op-9-1>  
upvoted 3 times

ET Answer:

## Answer Area

Required association	Action
Corporate office to a subsidiary	Add a child account. Add a parent account. <b>Create a parental relationship.</b> Create a referential relationship.
Individuals to companies	Add a child account. <b>Add a parent account.</b> Create a parental relationship. Create a referential relationship.
Parents to their children	Add a child account. Add a parent account. <b>Create a parental relationship.</b> <b>Create a referential relationship.</b>

Bing:

To track the relationship between a corporate office and its subsidiaries, you should **Add a Parent Account**. In Dynamics 365 Sales, you can use the out-of-the-box functionality to create a hierarchical relationship between accounts by adding a parent account to a subsidiary. This will allow you to display the information in a hierarchical view and track the relationship between the corporate office and its subsidiaries. So, the correct answer is **B. Add a parent account**. Is there anything else you would like to know? 😊

To track the relationships between individual consumers and companies, you should **create a referential relationship**. This will allow you to log information about parents and their children for individual consumers, and if a record for a parent is deleted, the record for the child will also be deleted. For companies that are subsidiaries, you can record their relationship to a corporate office and display the information in a hierarchical view.

To track the relationships between parents and their children for individual consumers, you should **create a parental relationship**. This will allow you to log information about parents and their children, and if a record for a parent is deleted, the record for the child will also be deleted. This can be achieved by using out-of-the-box functionality.

## Question 17

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

Answer: D

 **Net\_IT** 5 months ago

Correct

   upvoted 1 times

Bing:

To implement the Microsoft Relationship Sales solution for a company that uses Dynamics 365 Sales, you should install the **Sales Navigator** add-on. This will allow you to use the Microsoft Relationship Sales solution with LinkedIn Sales Navigator and Dynamics 365 Sales to build profitable relationships for your business <sup>1</sup>. So, the correct answer is D. **Sales Navigator**.

## Question 18

You are working in Dynamics 365 Sales. You turn on the visibility of the Dynamics 365 Sales records in the channel.

A user working with leads is unable to pin the view into Microsoft Teams.

You need to identify the issue.

What should you do?

- A. Add users to the Teams channel.
- B. Add users to the correct security role.
- C. Enable the External links within Teams option.
- D. Enable the Turn on Enhanced Microsoft Teams integration option.
- E. Disable the Turn on the linking of Dynamics 365 records to Microsoft Teams channels option.

ET User: D

<https://www.c5insight.com/Resources/Blog/tabid/148/entryid/3978/enhanced-integration-microsoft-teams-dynamics-365.aspx>

✉️ df14ce0 5 months, 1 week ago

the right answer is D

<https://www.c5insight.com/Resources/Blog/tabid/148/entryid/3978/enhanced-integration-microsoft-teams-dynamics-365.aspx>

👍 ↗️ 🎉 upvoted 3 times

ET Answer: B

Bing:

If a user working with leads is unable to pin the view into Microsoft Teams, you should **add users to the correct security role**. This will ensure that the user has the necessary permissions to pin the view into Microsoft Teams. So, the correct answer is **B. Add users to the correct security role**. Is there anything else you would like to know? 😊

## Question 19

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.

### Answer Area

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

ET User:

Playbook

Sequence

Sequence

 **DS2306** 4 months ago

In my opinion it has to be

Playbook

Sequence

Sequence

   upvoted 4 times

ET Answer:

### Answer Area

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

## Question 20

HOTSPOT -

Your company uses Microsoft Teams and Dynamics 365 Sales.

The administrator encounters the following issues with the integration of Dynamics 365 Sales and Teams:

- The administrator is unable to add a team member to a Teams channel for Dynamics 365 record collaboration.
- The administrator is unable to enable the Enhanced Collaboration Experience in Dynamics 365 Sales settings.

You need to resolve the issues.

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

NOTE: Each correct selection is worth one point.

### Answer Area

Issue	Resolution
Unable to add a team member.	<input type="checkbox"/> Enable Basic Collaboration. <input type="checkbox"/> Enable Sensitive labels. <input checked="" type="checkbox"/> Enable Enhanced Collaboration Experience.
Unable to enable the Enhanced Collaboration Experience.	<input type="checkbox"/> Assign Microsoft 365 tenant administrator permissions. <input type="checkbox"/> Assign system administrator permissions to the environment. <input checked="" type="checkbox"/> Assign Teams administrator permissions.

ET User:

Enable Enhanced Collaboration Experience.

Assign Microsoft 365 tenant administrator permissions.

<https://learn.microsoft.com/en-us/dynamics365/sales/teams-integration/teams-collaboration>

  df14ce0 5 months, 1 week ago

the first question is C : Basic collaboration does not allow the administrator to add members but with the Enhanced collaboration you can

   upvoted 3 times

  df14ce0 5 months, 1 week ago

<https://learn.microsoft.com/en-us/dynamics365/sales/teams-integration/teams-collaboration>

   upvoted 1 times

ET Answer:

## Answer Area

Issue	Resolution
Unable to add a team member.	<ul style="list-style-type: none"><li>Enable Basic Collaboration.</li><li>Enable Sensitive labels.</li><li>Enable Enhanced Collaboration Experience.</li></ul>
Unable to enable the Enhanced Collaboration Experience.	<ul style="list-style-type: none"><li>Assign Microsoft 365 tenant administrator permissions.</li><li>Assign system administrator permissions to the environment.</li><li>Assign Teams administrator permissions.</li></ul>

Bing:

If the administrator is unable to add a team member to a Teams channel for Dynamics 365 record collaboration, they should **enable the Enhanced Collaboration Experience**. This will allow the administrator to add team members to a Teams channel for Dynamics 365 record collaboration <sup>1</sup>. So, the correct resolution is to **Enable Enhanced Collaboration Experience**. Is there anything else you would like to know? 😊

To resolve the issue of being unable to enable the Enhanced Collaboration Experience in Dynamics 365 Sales settings, you should assign **Microsoft 365 tenant administrator permissions** <sup>1</sup>. This is because, according to Microsoft Learn, you need **Microsoft 365 tenant admin permissions** to enable the Enhanced Collaboration Experience <sup>1</sup>. Is there anything else you would like to know? 😊

## Question 21

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.

Answer: B

 **MARIO2011** 4 days, 12 hours ago

This question was part of my exam on August 19

   upvoted 1 times

 **AhmedGad** 3 months, 3 weeks ago

**Selected Answer: B**

Correct

   upvoted 1 times

Bing: B

To improve the accuracy of a Dynamics 365 Sales Insights predictive model, you should **retrain the model**<sup>1</sup>. According to Microsoft Learn, the accuracy of a predictive scoring model depends on several factors, including the quality and amount of data available for training the model, the business process flow and filters that you select, and the stages and attributes you select if the model uses per stage modeling<sup>1</sup>. Retraining the model can help improve its accuracy by using more recent data and fine-tuning its parameters<sup>1</sup>. Is there anything else you would like to know?

## Question 22

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. Roll up entity

Answer: C

 **MARIO2011** 4 days, 12 hours ago

This question was part of my exam on August 19

   upvoted 1 times

Bing: C

To configure a forecast by territory in Dynamics 365 Sales, you should configure the **Hierarchy entity** parameter <sup>1</sup>. According to Microsoft Learn, when creating a forecast, you can select a template to define how the forecast structures your organization's data and projections <sup>1</sup>. If you want to create a forecast based on sales territories, you can select the **Territory forecast** template, which uses the sales territory hierarchy for rollup columns and projections <sup>1</sup>. The hierarchy entity parameter defines the entity used for the hierarchy in the forecast <sup>1</sup>. Is there anything else you would like to know? 😊

# Simulation

## Question 1

### SIMULATION -

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

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

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A sales manager requests to view all the closed opportunities by source campaigns. The manager wants the visual formatted as a stacked bar comparison of which closed opportunities are won versus lost.

You need to configure your environment to provide access to the visual. You must name the visual Opportunities Won vs. Lost by Campaign.

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

Answer: See explanation below.

1. Create a new chart.
2. Select bar chart.
3. Name the chart Opportunities Won vs. Lost by Campaign.
4. Select the Opportunities view to be used by the chart.
5. Configure the Legend Entries for Opportunities Won and Opportunities Lost by source campaigns.
6. Click Save & Close.

 **MARIO2011** 22 hours, 34 minutes ago

On exam 19/08/23, this type of exercise did not enter.

   upvoted 1 times

## Question 2

### SIMULATION -

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

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You need to create a copy of Sales Dashboard and name the dashboard Sales Dashboard 2.

The new dashboard must NOT include a view that displays the activities widgets.

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

Answer: See explanation below.

1. Navigate to Dashboards.
2. Open the Sales Dashboard.
3. Click Save As and enter the name Sales Dashboard 2 to save a copy of the dashboard.
4. Click Edit.
5. Select the view that displays the activities widgets.
6. Click Remove
7. Click Save.

## Question 3

### SIMULATION -

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

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

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

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

Answer: See explanation below.

1. Navigate to Settings > Customization > Customize the System.
2. Expand the Entities menu.
3. Scroll down and expand Leads, then click on Fields.
4. Double click on the Status Reason field.
5. Change status to Disqualified.
6. Click Add.
7. Type in the new status reason: Cannot meet timeline for delivery
8. Click OK.
9. Click Publish All Customizations.
10. Open the lead named Brian LaMee.
11. From the command bar, click Disqualify and select the new status reason.

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

✉ sanyog7 6 days, 5 hours ago

Correct. Tested too

1 upvoted 1 times

✉ reddakini 5 months, 3 weeks ago

Are there really labs in the exam?

]

1 upvoted 1 times

## Question 4

### SIMULATION -

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You gather information from a prospect named Cat Francis to qualify the prospect as a new sales opportunity.

You need to identify the prospect, complete all the required fields, and qualify the prospect in the sales process.

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

See explanation below.

You need to create a lead and qualify the lead.

1. Navigate to Leads.
2. Click New.
3. In the Qualify stage of the process bar, select the contact named Cat Francis. When you select an existing contact while creating a lead record, the following information is automatically populated in the Lead form: First Name, Last Name, Job Title, Business Phone, Mobile Phone and Email.
4. Click Save.
5. In the Lead record, click the Qualify button in the toolbar. This will convert the lead to an opportunity.

Reference:

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

## Question 5

### SIMULATION -

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

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You receive a request to prevent a salesperson from advancing an opportunity to the Propose stage of the Lead to Opportunity Sales Process until the salesperson captures the customer need.

You need to configure your environment to meet the requirement.

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

Answer: See explanation below.

You need to edit the Lead to Opportunity Sales Process business process flow by making the step mandatory.

1. In the site map, select Sales Settings.
2. Under Customization, select Business Process Flows.
3. Select the Lead to Opportunity Sales Process business process flow.
4. In the Develop stage of the business process flow, select the Customer Need step.
5. Tick the Required checkbox to make this step mandatory.
6. Click Save to save the changes.

Reference:

<https://docs.microsoft.com/en-us/dynamics365/sales-professional/customize-business-process-flows>

## Question 6

### SIMULATION -

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

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

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

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

Answer: See explanation below.

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

Reference:

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

## Question 7

### SIMULATION -

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

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

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

Answer: See explanation below.

1. In the site map, select Opportunities.
2. Open the opportunity record.
3. Type Home Entertainment into the Topic field.
4. Save the changes.
5. In the opportunity record, click Close as Lost.
6. In the Close Opportunity dialog box, click on the Competitor field then search for and select Carter Electronics.
7. Click OK.

Reference:

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

## Question 8

### SIMULATION -

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

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

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

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

Answer: See explanation below.

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

1. Go to Settings > Customizations.
2. Select Customize the System.
3. Under Components, expand Entities, and then select the Opportunity entity.
4. Select Fields.
5. Click New.
6. Create the Billing Contact field.
7. Set the Field Requirement to Business Required.
8. Set the Data Type to Lookup.
9. For the Target Record Type select Contact.
10. Click Save and Close.
11. Click Publish All Customizations.
12. Open the Opportunities form.
13. In the Field Explorer drag the new field into the form.
14. Click Save
15. Click Publish

## Question 9

### SIMULATION -

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

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

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Your company wants every lead record to be rated as Cold when the record is created. You need to configure the instance and validate your changes by creating and saving a new lead record named New roof for a user named Sam Smith.

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

Answer: See explanation below.

1. Go to Settings > Customizations.
2. Select Customize the System.
3. Under Components, expand Entities, and then select the Lead entity.
4. Select Fields.
5. Select the Rating field and click Edit.
6. Set the Default Value to Cold.
7. Click Save and Close.
8. Click Publish All Customizations.
9. In the site map, select Leads.
10. Select New.
11. Enter New Roof in the Topic field.
12. Enter Sam Smith in the Name fields.
13. Verify that the Rating is Cold.
14. Save the Lead record.