MB-210^Q&As

Microsoft Dynamics 365 Sales

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QUESTION 1

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:

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

Correct Answer:

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

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

QUESTION 2

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

Correct Answer:

Answer Area

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

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

QUESTION 3

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

Correct Answer: A

Reference: https://docs.microsoft.com/en-us/dynamics365/customer-engagement/sales-enterprise/create-edit-competitor-record-sales

QUESTION 4

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:

Create a lead

- Qualify
- Develop
- Propose
- Close

Identify stakeholders

- Qualify
- Develop
- Propose
- Close

Present the proposal

- Qualify
- Develop
- Propose
- Close

Process orders

- Qualify
- Develop
- Propose
- Close

Correct Answer:

Create a lead

- Qualify
- Develop
- Propose
- Close

Identify stakeholders

- Qualify
- Develop
- Propose
- Close

Present the proposal

- Qualify
- Develop
- Propose
- Close

Process orders

- Qualify
- Develop
- Propose
- Close

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

QUESTION 5

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

Correct Answer: C