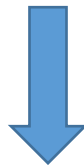


Microsoft Dynamics 365 Certification MB-210 Exam



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

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NEW QUESTION 1

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

NEW QUESTION 2

You manage a default Dynamics 365 for 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. Choose three.)

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

Answer: ACD

Explanation:

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

NEW QUESTION 3

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

Explanation:

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

NEW QUESTION 4

An organization uses sales dashboards in Dynamics 365. You need to configure a single a 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. Choose three.)

- 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.

Answer: ABE

NEW QUESTION 5

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

Explanation:

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

NEW QUESTION 6

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

NEW QUESTION 7

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. Choose two.)

- 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.

Answer: AB

NEW QUESTION 8

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

NEW QUESTION 9

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.)

Answer Area

Requirement	Option
View individual products in a grouping when you create an opportunity.	<div style="border: 1px solid gray; padding: 2px;">▼</div> <div style="border: 1px solid gray; padding: 2px;">Kit</div> <div style="border: 1px solid gray; padding: 2px;">Bundle</div>
Sell products from a grouping individually.	<div style="border: 1px solid gray; padding: 2px;">▼</div> <div style="border: 1px solid gray; padding: 2px;">Kit</div> <div style="border: 1px solid gray; padding: 2px;">Bundle</div>
Create a grouping within a grouping.	<div style="border: 1px solid gray; padding: 2px;">▼</div> <div style="border: 1px solid gray; padding: 2px;">Kit</div> <div style="border: 1px solid gray; padding: 2px;">Bundle</div>

Answer:

Answer Area

Requirement	Option
View individual products in a grouping when you create an opportunity.	<div style="border: 1px solid gray; padding: 2px;">▼</div> <div style="border: 1px solid gray; padding: 2px;">Kit</div> <div style="border: 1px solid gray; padding: 2px; background-color: #e0ffe0;">Bundle</div>
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NEW QUESTION 10

Drag and 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.)

Records and Components	Answer Area
units	
products	
price lists	
product families	
price list items	
discount lists	
unit groups	

Answer:

Records and Components	Answer Area
	unit groups
	units
product families	products
	price list items
discount lists	price lists

NEW QUESTION 11

You are a Dynamics 365 for 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

Answer: A

Explanation:

<https://docs.microsoft.com/en-us/dynamics365/customer-engagement/sales-enterprise/define-related-products-increase-chances-sales>

NEW QUESTION 12

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

Explanation:

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

NEW QUESTION 13

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

NEW QUESTION 14

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NEW QUESTION 96

You are a Sales Manager using Microsoft Dynamics 365. You need to analyze how your sales performance and activities relate to sales of products that happened after the initial order. The sales transactions are stored in an ERP system. Which tool should you use to combine your sales activities with your ERP sales data?

- A. Power BI
- B. Excel Templates
- C. the Report Wizard in Dynamics 365
- D. Charts and Dashboards

Answer: A

NEW QUESTION 97

As your company grows, you need a way to capture the relationship between the people that you know and the organizations they currently work for. How are these details tracked in a default

configuration of Microsoft Dynamics 365?

- A. Many accounts can be associated with many contacts.
- B. Multiple company records can be selected on the company field inside contact records.
- C. One account can be associated with many contacts.
- D. One account can be associated with only one contact.

Answer: C

NEW QUESTION 98

You are working with a sales division to better manage their sales processes by better utilizing the functionality of Microsoft Dynamics 365. You recommend using Relationship Insights to better analyze customer-interaction data to improve sales efforts. What are two features of Relationship Insights that can be used to accomplish this? (Each correct answer presents a complete solution. Choose two.)

- A. Auto Capture
- B. Data Loader Service
- C. Relationship Assistant
- D. Sales Insights

Answer: AC

NEW QUESTION 99

You are working for a company that is in the process of trying to secure a large contract. As you work with this sales opportunity, you need to manage all the various people involved in the sale, both from the customer and external stakeholder point of view. You need visibility on the Opportunity record to do this. Which type of functionality can you use in Microsoft Dynamics 365 to facilitate visibility of those involved?

- A. Stakeholders
- B. Business Process Flows
- C. Contact Preferences
- D. Chats

Answer: A

NEW QUESTION 100

You receive an email from a prospect and would like to create a Lead in Microsoft Dynamics 365. You want the email from the prospect connected to the Lead. How can you accomplish this goal?

- A. Navigate to your instance in Microsoft Outlook and create a Lead.
- B. Track the email- Manually create a Lead in Microsoft Dynamics 365.
- C. Track the email. Convert the email to a Lead record.
- D. Create a Lead from the CRM tab in Microsoft Outlook.

Answer: C

Explanation:

<https://www.microsoft.com/en-us/dynamics/crm-customer-center/overview-of-tracking-records-in-dynamics-365-for-outlook.aspx>

NEW QUESTION 101

You are a sales person using Microsoft Dynamics 365. You need to use the web client to show the outcomes of an Opportunity to your sales team. Which three types of information should you capture on a Resolution Activity related to a closed Opportunity? (Each correct answer presents part of the solution. Choose three.)

- A. Actual revenue amount from the Opportunity.
- B. The status of the Opportunity, Won or Lost.
- C. Appointment activities.
- D. Phone call activities.
- E. Close date of the Opportunity.

Answer: ABE

NEW QUESTION 102

You have received an email from a person you met at a conference you recently attended. The email mentions that their organization might be interested in the services provided by your organization. You need to create a record for this person in Microsoft Dynamics 365 to be later set to the qualified status by your organization. Which record type can be used to accomplish this goal?

- A. Account
- B. Opportunity
- C. Lead
- D. Contact

Answer: C

NEW QUESTION 103

You have exchanged a few emails with a lead and it is now evident that your organization will be able to fulfill the customer's need. You need to proceed to the next step on the sales process and remove the lead from the Open Leads view, but keep it in the system for later review. What should you do?

- A. Delete the Lead.
- B. Activate the Lead
- C. Close the Lead as Won.
- D. Qualify the Lead.

Answer: D

NEW QUESTION 104

You are working on a sales opportunity for a maintenance company. You learn that the company has a new COO. You need to quickly add this new person to the opportunity. Which form should you use to capture this information in relationship to the opportunity?

- A. Quick Create Activity form.
- B. Quick Create Campaign Response form.
- C. Quick Create Lead form.
- D. Quick Create Contact form.

Answer: D

NEW QUESTION 105

You need to be able to differentiate between customers who are up-to-date on their payments and customers who are delinquent. Delinquent customers need to be set to read only, while the rest should be available for read and write purposes. Which two Microsoft Dynamics 365 status settings can you use to accomplish this goal? (Each correct answer presents a complete solution. Choose two.)

- A. Qualified
- B. Delinquent
- C. Inactive
- D. Active

Answer: CD

NEW QUESTION 106

You are working with an organization that uses Microsoft Dynamics 365 for sales. You want to show the sales personnel action carets with reminders for opportunity close dates, activities, reminders for emails that have not been responded to, and statistics on how often sent emails have been opened by recipients. Which features should you implement in Dynamics 365?

- A. Relationship Insights with Auto Capture and Email Engagement.
- B. Relationship Insights with Relationship Assistant and Email Engagement.
- C. Relationship Insights with Relationship Analytics and Email Engagement.
- D. Relationship Insights with Relationship Analytics and Relationship Assistant.

Answer: C

Explanation:

<http://www.crmsoftwareblog.com/2017/03/microsoft-dynamics-365-all-about-insights/>

NEW QUESTION 107

You are the project manager for a Microsoft Dynamics 365 implementation and are training the company sales staff. All staff members use laptops with the Microsoft Office Suite fully installed. How can sales staff access and use Dynamics 365 when they are traveling outside of the office? (Each correct answer presents a complete solution. Choose two.)

- A. They can use Microsoft Outlook.
- B. They can use any web browser.
- C. They can gain online access by using the Azure portal.
- D. They can use Skype for Business.

Answer: AB

NEW QUESTION 108

You are using Microsoft Dynamics 365 on your tablet. You need to be able to edit the opportunity records using Editable Grids on the tablet. What do you need to do to enable Editable Grids on your tablet for opportunities?

- A. You need to enable Editable Grids under Settings in the tablet client.
- B. You need to enable Editable Grids under Options in the web client.
- C. You need to ask your system administrator to enable Editable Grids for tablets.
- D. You need to ask your system administrator to enable Editable Grids for tablets.

Answer: C

NEW QUESTION 109

You are the sales manager for your company. You want to track key performance indicators as well as record activities for all of your clients in order to improve the ratio of, and turn leads into, sales. Which feature of Microsoft Dynamics 365 will allow you to do this?

- A. Relationship Analytics
- B. Email Engagement
- C. Auto Capture
- D. Relationship Assistant

Answer: C

NEW QUESTION 110

You are a sales manager for a large sales organization that uses Microsoft Dynamics 365. Many of your products have different pricing, based on geographical area. You want your sales people to automatically be assigned the designated price, based on their assigned territory. How can you accomplish this?

- A. Assign a product catalog for each territory.
- B. Assign a default price list for each territory.
- C. Assign a discount list for each territory.
- D. Assign a base currency for each territory.

Answer: B

NEW QUESTION 111

You are working in the Sales module of Microsoft Dynamics 365. Your manager has asked you to provide a report of Sales Pipeline as quickly as possible. What is the quickest way to provide your manager with the report?

- A. Use one of the built-in reports in Microsoft Dynamics 365.
- B. Create an Advanced Find query of your opportunities, sorted by client.
- C. Create a Static Worksheet and export to Excel.
- D. Create a Dynamic Worksheet and export to Excel.

Answer: A

NEW QUESTION 112

You are a support specialist in charge of managing a product catalog within Microsoft Dynamics 365 for your company. You are asked to configure Microsoft Dynamics 365 so that management can analyze sales trends by product category. How should you meet this requirement?

- A. Create multiple product relationships.
- B. Create multiple product families.
- C. Create multiple product bundles.
- D. Create multiple product catalogs.

Answer: B

Explanation:

<https://www.microsoft.com/en-us/dynamics/crm-customer-center/create-a-product-family.aspx>

NEW QUESTION 113

One of your prospects is reviewing a quote you have provided and will be making a decision to either accept or revise your offer. You need to reflect the prospect's response by setting the quote status. Which two options can you use to achieve this goal? (Each correct answer presents a complete solution. Choose two.)

- A. Fulfilled
- B. Won
- C. Inactive
- D. Draft

Answer: BD

NEW QUESTION 114

You have been communicating with a lead for two weeks, and now you have determined that you are in a good position to move forward on your sales process. You have decided to qualify the lead. When qualifying the lead, what happens next in your standard sales process?

- A. An order is created.
- B. An opportunity is created.
- C. An invoice is created.
- D. A quote is created.

Answer: B

NEW QUESTION 115

You need to be able to export your data to Excel, edit in Excel, and then, once the edits are completed, update the records in Microsoft Dynamics 365 with your changes. Which two options require Microsoft Dynamics 365 for Outlook to refresh the data in Microsoft Dynamics 365? (Each correct answer presents a complete solution. Choose two.)

- A. Export to Static Worksheet
- B. Export to Excel Online
- C. Export to Dynamic Pivot Table
- D. Export to Dynamic Worksheet

Answer: AB

NEW QUESTION 116

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