QUESTION 228
Case Study 1 - Humongous Insurance
Background
Humongous Insurance provides fleet automotive insurance. The company's accounting year is July 1st-June 31st. They have experienced rapid growth by acquiring brokerages that have locations in Canada, the United States, and the United Kingdom.
The company is making a big push for the start of their second quarter on October 1st.
Current environment
- United States salespeople are located in either the north, east, south, west, or national territory.
- Only national territory sales team members can send quotes and invoices across multiple territories.
- Sales managers route leads based on territory.
- Salesperson1 and Salesperson2 are part of the south region and the national account, respectively.
- Salespeople cannot accurately report progression of sales and whether they are closed or still in process.
- Manager and underwriter approval is communicated by email.
- Many salespeople use different quote layouts.

Requirements
Territories
- Each territory must be set up as a Business Unit for security.
- Each territory must have the ability to qualify its own leads.

Security
- National sales team members must have privileges in order to see sales and account information managed by the regional sales teams.
- Configure appropriate security for national and each regional sales.

Goals
- Salespeople's goals must roll up to their manager's goal.
- Goal metrics need to automatically calculate every 12 hours.

Quotes
- Set up version traceability for quotes.
- Quotes must be marked with the word "Final" when approved.
- Quotes and orders must be generated in their client's currency.
- Quotes and invoices must be able to be viewed across a variety of devices.
- Pricing must be standardized for insurance products while supporting tiered pricing across national and regional accounts.

Opportunities
- Closed opportunities that are won or lost must capture competitor information. The company wants a visualization built for the categories related to why the opportunities closed a certain way.
- When an opportunity is nearing time to quote, products should be added to the opportunity.

Other requirements
- Simplify data entry and reduce dual data entry.

▪ Help salespeople and their managers keep track of where they are in the sales process.
▪ Use out-of-the-box reports where possible.
▪ Generate invoice numbers automatically.
▪ Begin invoice numbers with the letters INV.
▪ Allow managers to be able to view a diagram and drill down to leads converted in the last 30 days.

Issues

▪ 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.

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

QUESTION 229
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・Updated products are not easily updated within the product groups.
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・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.

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

QUESTION 230
Case Study 1 - Humongous Insurance
Background

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Requirements
Territories

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・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.
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: A

QUESTION 231
Case Study 1 - Humongous Insurance
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・ClientA purchases products from multiple regions for a single order.

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

Hotspot Question

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.

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

QUESTION 232
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- 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.

Hotspot Question
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.

Answer Area

Configuration	Scope
Goal calculation	System Manual Recalculate as needed Business entity
Goal type	Child Parent Stretch

Answer:

Answer Area

Configuration	Scope
Goal calculation	System Manual Recalculate as needed Business entity
Goal type	Child Parent Stretch

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

QUESTION 233
Case Study 1 - Humongous Insurance
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- 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.

Hotspot Question
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.

Answer Area

Requirement	Configuration
Send quotes in a read-only format	Use PDF Use XML Use RTF Use CSV
Create a standardized quote that can be re-used	Create a Word template Create a Fetch XML report Create a PowerBI app

Answer:

Answer Area

Requirement	Configuration
Send quotes in a read-only format	Use PDF Use XML Use RTF Use CSV
Create a standardized quote that can be re-used	Create a Word template Create a Fetch XML report Create a PowerBI app

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

QUESTION 234
Case Study 4 - Contoso, Ltd
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

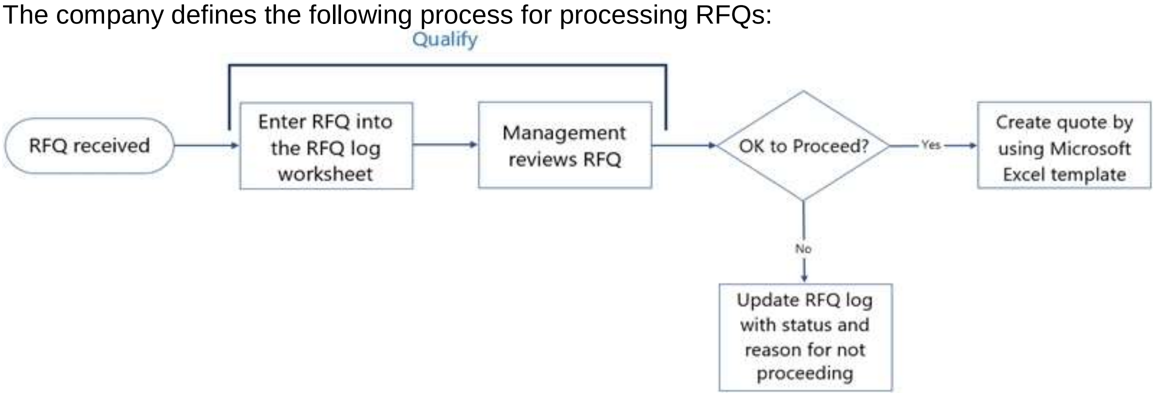
- Customers who have operations in more than one country are managed by the sales team within the country from which a request originated. However, it is difficult to get information about sales for these customers.
- Each salesperson manually creates customer quotes using Microsoft Word and Excel templates. 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.

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

QUESTION 235
Case Study 4 - Contoso, Ltd
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.

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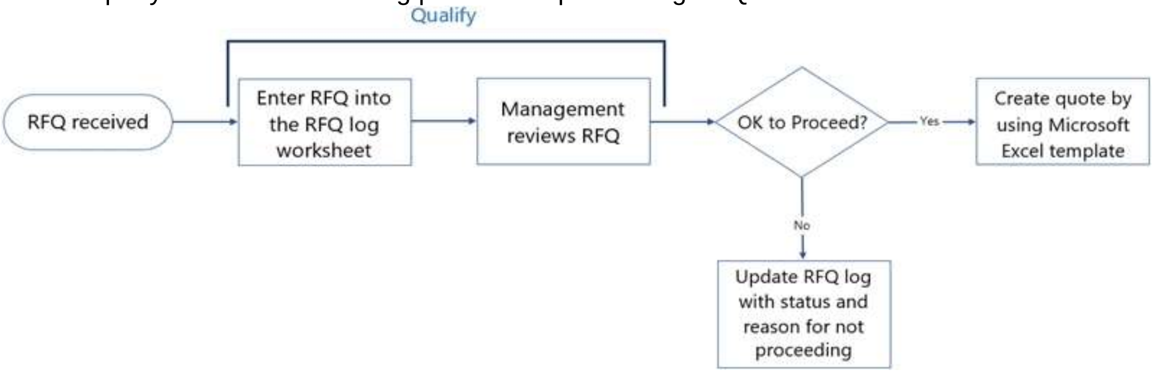

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- All information must be accessible to the entire executive management team.
- Country-specific sales information must be accessible only to sales representatives assigned to those teams.
- Sales and quote processes must be standardized across all 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.
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・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.

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

QUESTION 236
Case Study 4 - Contoso, Ltd
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:
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Current environment
Sales

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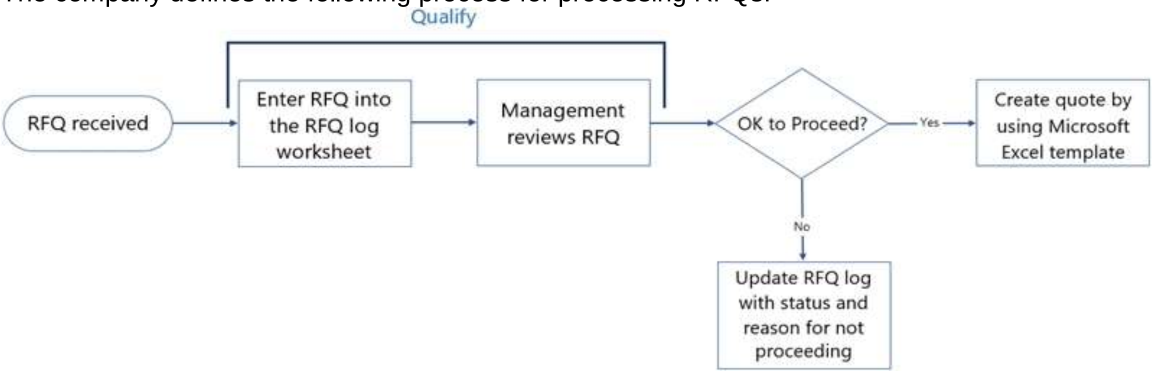
- Individual sales targets are based on product lines by quarter.

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.

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

QUESTION 237
Case Study 4 - Contoso, Ltd
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.

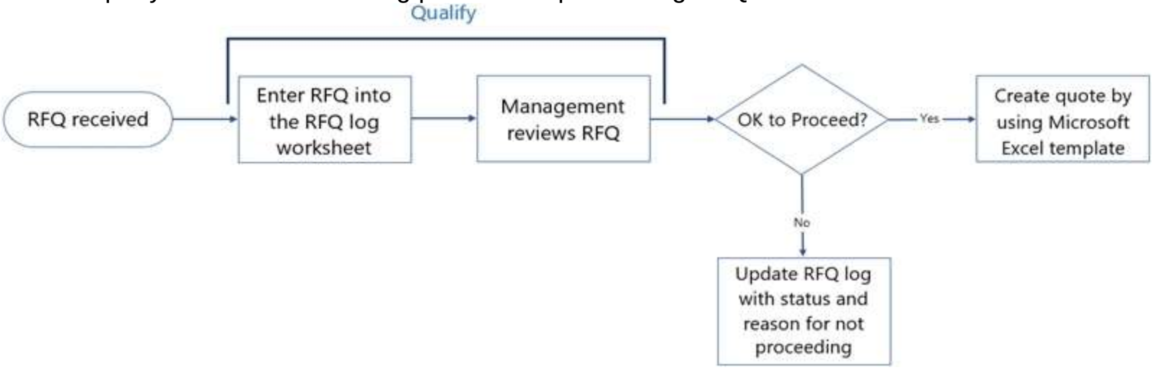
・Each sales team maintains a spreadsheet in which they record customer requests for quotes (RFQs). The spreadsheets are stored on a network drive.

・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.

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

QUESTION 238
Case Study 4 - Contoso, Ltd
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.

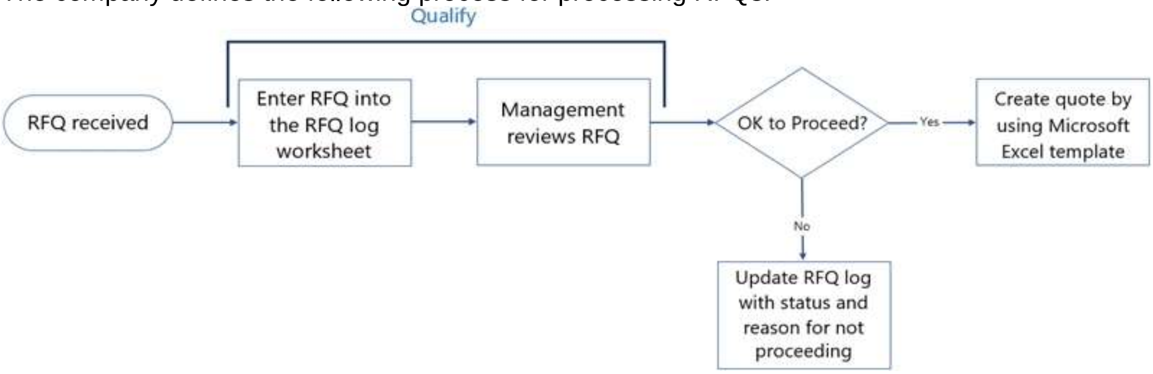
▪ Each sales team maintains a spreadsheet in which they record customer requests for quotes (RFQs). The spreadsheets are stored on a network drive.

▪ 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

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▪ 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.
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- 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.

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

QUESTION 239
Case Study 4 - Contoso, Ltd
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.

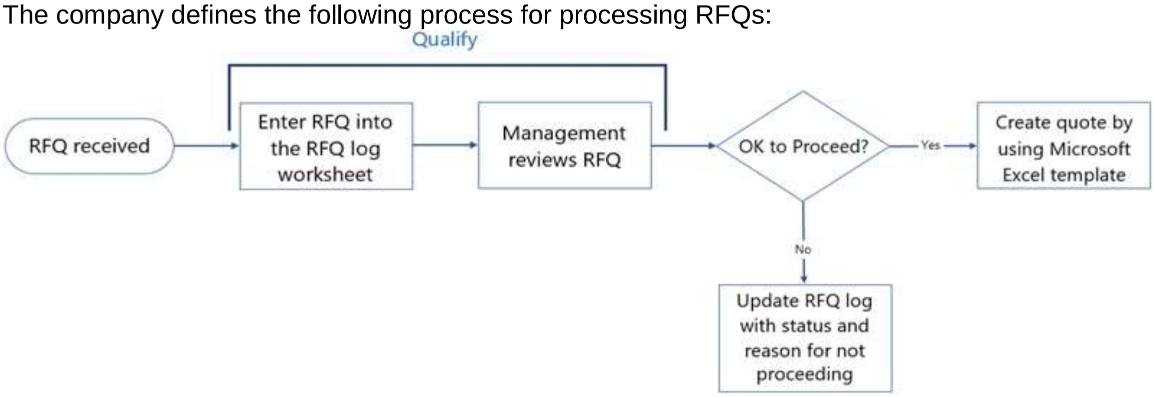
・Each sales team maintains a spreadsheet in which they record customer requests for quotes (RFQs). The spreadsheets are stored on a network drive.

・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.

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

QUESTION 240
Case Study 4 - Contoso, Ltd
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.

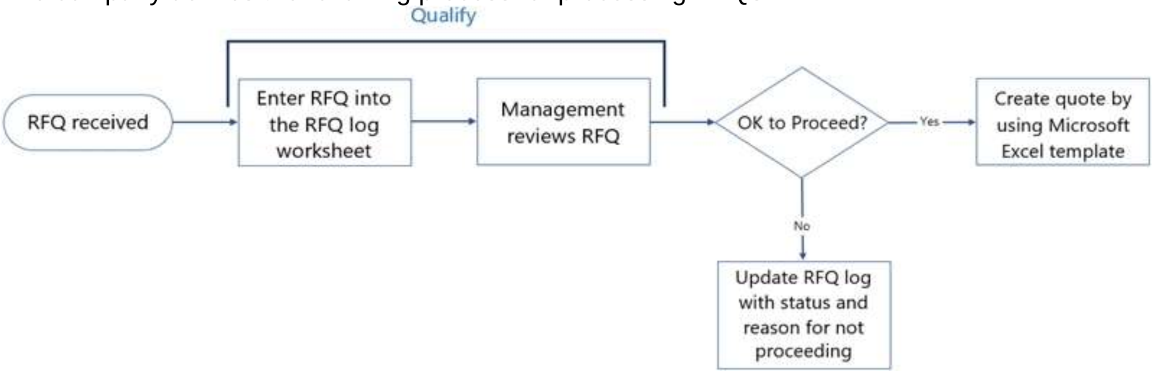
▪ Each sales team maintains a spreadsheet in which they record customer requests for quotes (RFQs). The spreadsheets are stored on a network drive.

▪ 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.

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- 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.

Hotspot Question
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.

Answer Area

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

Answer:

Answer Area

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

QUESTION 241
Case Study 4 - Contoso, Ltd
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.
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Sales teams

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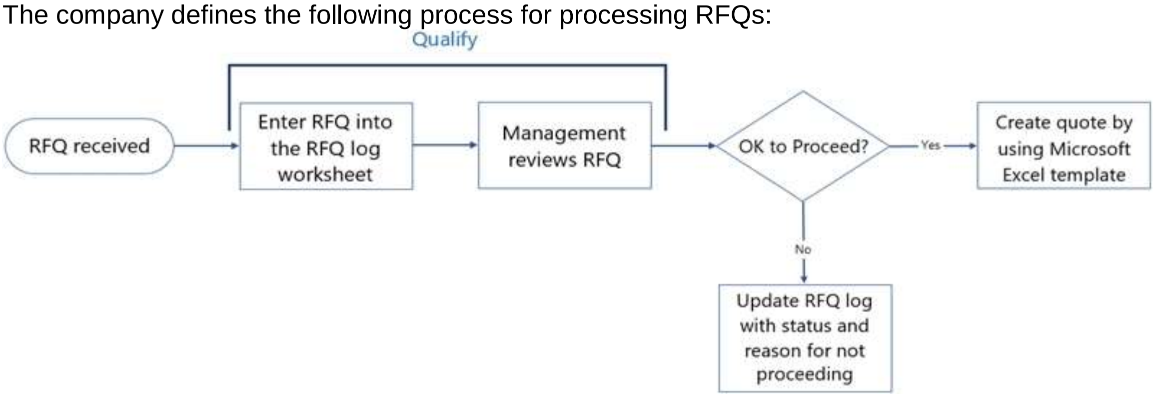
- Each sales team has a projected revenue target that is tied to the factory capacity in their country, except for the global team. The global team’s projected revenue target is derived using a percentage of their actual sales from the previous year.

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

Credit and reference checks

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- 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.
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- 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.

Hotspot Question
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.

Answer Area

Requirement	Action
Include projected revenue by factory capacity.	Set the hierarchical entity to Territory. Set the rollup entity to Product. Set the goal metric to Revenue. Set the hierarchical entity to Product.
Include current revenue targets.	Upload quota data for each territory. Create a goal metric. Create a goal target for revenue. Upload a goal target from an Excel template.
Include both high confidence and won opportunities.	Create a calculated column and add it to the column layout. Add the Committed and Won values to the column layout. Create a rollup column and add it to the column layout. Add a calculated value to the Opportunities Forecast view.

Answer:

Answer Area

Requirement	Action
Include projected revenue by factory capacity.	Set the hierarchical entity to Territory. Set the rollup entity to Product. Set the goal metric to Revenue. Set the hierarchical entity to Product.
Include current revenue targets.	Upload quota data for each territory. Create a goal metric. Create a goal target for revenue. Upload a goal target from an Excel template.
Include both high confidence and won opportunities.	Create a calculated column and add it to the column layout. Add the Committed and Won values to the column layout. Create a rollup column and add it to the column layout. Add a calculated value to the Opportunities Forecast view.

Explanation:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/capture-forecast-category-opportunity
https://rocketcrm.co.uk/sales-forecasting-dynamics-365-new-feature/

QUESTION 242
Case Study 4 - Contoso, Ltd
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

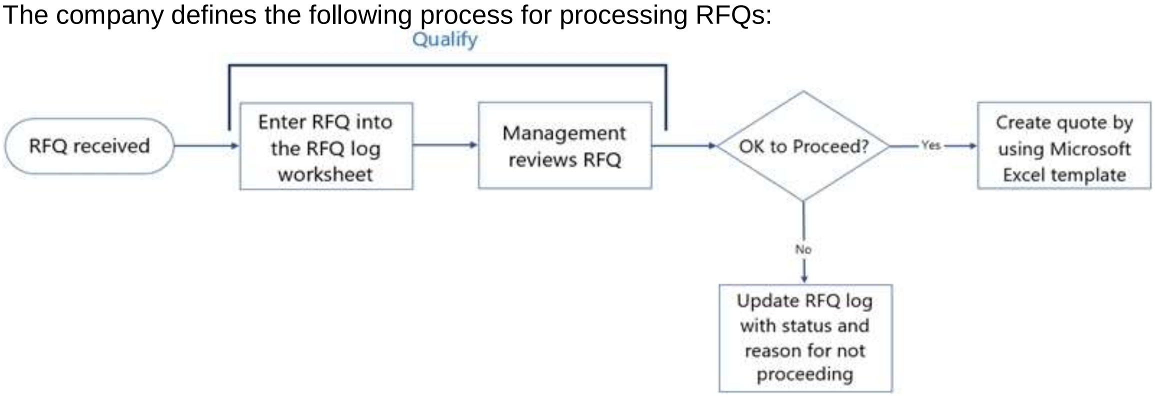
- Customers who have operations in more than one country are managed by the sales team within the country from which a request originated. However, it is difficult to get information about sales for these customers.
- Each salesperson manually creates customer quotes using Microsoft Word and Excel templates. 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.

Hotspot Question
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.

Answer Area

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

Answer:

Answer Area

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

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