- **Vendor:** Microsoft
- **Exam Code:** MB-210
- **Exam Name:** Microsoft Dynamics 365 for Sales
- **New Updated Questions from Braindump2go (Updated in June/2023)**

QUESTION 246
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
Explanation:
https://docs.microsoft.com/en-us/dynamics365/sales-professional/manage-users

QUESTION 247
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
Explanation:
https://docs.microsoft.com/en-us/dynamics365/sales-professional/create-quote-pdf-sales-professional

QUESTION 248
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

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

QUESTION 249
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
Explanation:
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

QUESTION 250
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
Explanation:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/create-price-lists-price-list-items-define-pricing-products

QUESTION 251
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: D
Explanation:
https://docs.microsoft.com/en-us/power-bi/collaborate-share/service-organizational-content-pack-introduction

QUESTION 252
Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one

correct solution, while others might not have a correct solution.
After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.
A company uses Dynamics 365 Sales.
You create a playbook to send documents to new sales managers.
You need to configure the system to record all activity associated with each playbook.
Solution: Edit the playbook template and set the value of the Track Progress option to yes.
Does the solution meet the goal?

A. Yes
B. No

Answer: A
Explanation:
Activity tracking is enabled in the Playbook template.
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/track-playbook-activities

QUESTION 253
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.
Proposed solution: Recalculate the opportunity.
Does the solution meet the goal?

A. Yes
B. No

Answer: B
Explanation:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/keep-forecast-data-up-to-date

QUESTION 254
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.
Proposed solution: Recalculate the forecast.
Does the solution meet the goal?

A. Yes
B. No

Answer: A
Explanation:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/keep-forecast-data-up-to-date

QUESTION 255

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.
Proposed solution: Update the roll-up recurrence frequency.
Does the solution meet the goal?

A. Yes
B. No

Answer: B
Explanation:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/keep-forecast-data-up-to-date

QUESTION 256
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

QUESTION 257
Drag and Drop Question
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.

Actions	Answer Area
Navigate to Opportunities and select the Flow option.	
Select a Business Process Flow.	
Navigate to Processes.	
Edit the Process name.	

Answer:

Actions	Answer Area
Navigate to Opportunities and select the Flow option.	Navigate to Processes.
	Select a Business Process Flow.
	Edit the Process name.

Explanation:
https://docs.microsoft.com/en-us/dynamics365/customerengagement/on-premises/customize/create-business-process-

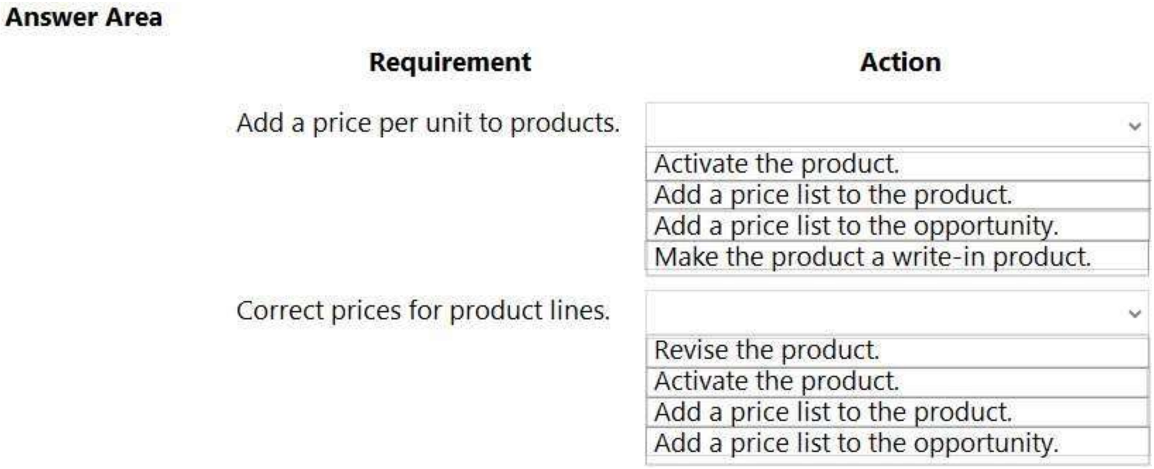
flow?view=op-9-1

QUESTION 258
Drag and Drop Question
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 case 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.

Answer:

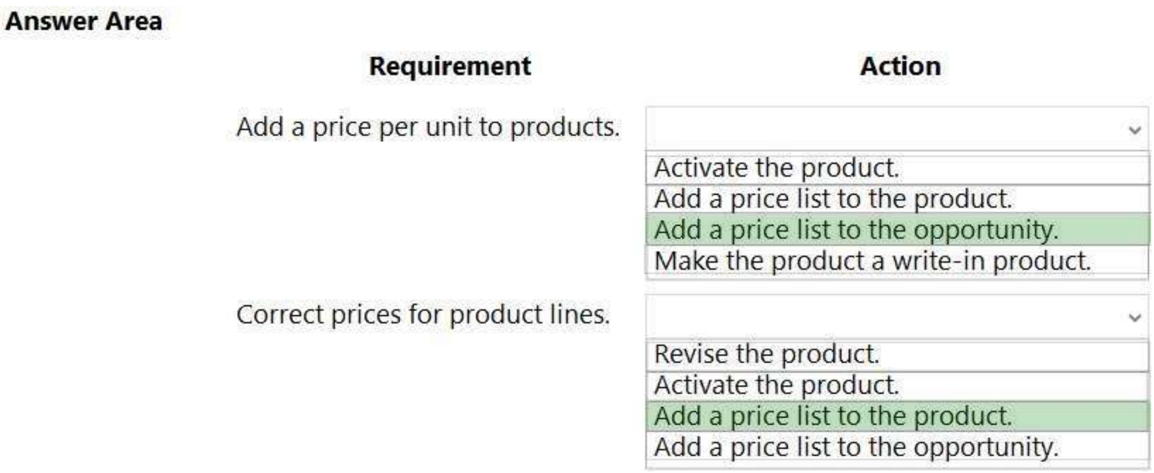
Explanation:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/set-up-product-catalog-walkthrough

QUESTION 259
Hotspot Question
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.


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.

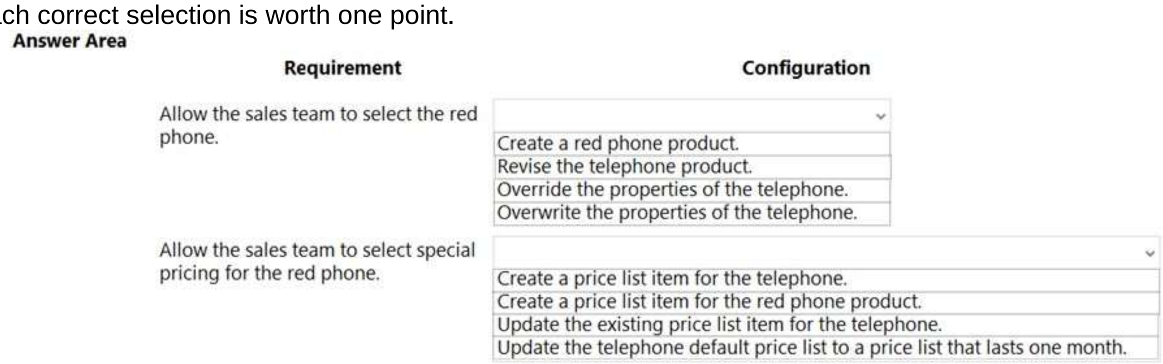
Answer:


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.

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

QUESTION 260
Hotspot Question
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.


Answer Area

Requirement	Configuration
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.

Answer:

Answer Area

Requirement	Configuration
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.

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

QUESTION 261
Drag and Drop Question
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.

Actions

- 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 Area

Answer:

Actions

- Add existing products from Get Products.
- Close the quote as Cancelled.

Answer Area

- Revise the quote.
- Add existing products from the products subgrid.
- Activate the quote.

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

QUESTION 262
Drag and Drop Question
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.

Actions

Update system settings.
Update the opportunity.
Update the price list item.
Update the opportunity product.

Answer Area

Issue	Action
Discount does not appear on the opportunity line item.	Action
Discount is applied incorrectly.	Action

Answer:

Actions

Update the opportunity.
Update the opportunity product.

Answer Area

Issue	Action
Discount does not appear on the opportunity line item.	Update the price list item.
Discount is applied incorrectly.	Update system settings.

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

QUESTION 263
Hotspot Question
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.

Answer Area

Step	Configuration
Configure a relationship definition.	account opportunity contact product
Select the top of the hierarchy.	customer name main event record parent opportunity field opportunity entity

Answer:

Answer Area

Step	Configuration
Configure a relationship definition.	account opportunity contact product
Select the top of the hierarchy.	customer name main event record parent opportunity field opportunity entity

Explanation:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/configure-forecast-using-custom-rollup-entity

QUESTION 264
Hotspot Question
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.

Answer Area

Requirement	Configuration
Set up playbooks for tracking activities.	Settings Activities Templates Categories
Set up record types for playbooks.	Accounts and Contacts Phone calls and Appointments Accounts, Contacts, and Activities Accounts, Contacts, and Sales literature

Answer:

Answer Area

Requirement	Configuration
Set up playbooks for tracking activities.	Settings Activities Templates Categories
Set up record types for playbooks.	Accounts and Contacts Phone calls and Appointments Accounts, Contacts, and Activities Accounts, Contacts, and Sales literature

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

QUESTION 265
Hotspot Question
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.

Answer Area

Requirement	Tool or service
Provide basic self-service customer support for frequently asked questions.	AI Builder Power Virtual Agents Sales Insights Assistant Relationship Sales
Provide actionable list of follow-up tasks for a customer based on prior buying history.	AI Builder Power Virtual Agents Sales Insights
Provide routing of new product inquiries to product sales experts or product team members.	AI Builder Power Virtual Agents Sales Insights

Answer:

Answer Area

Requirement	Tool or service
Provide basic self-service customer support for frequently asked questions.	AI Builder Power Virtual Agents Sales Insights Assistant Relationship Sales
Provide actionable list of follow-up tasks for a customer based on prior buying history.	AI Builder Power Virtual Agents Sales Insights
Provide routing of new product inquiries to product sales experts or product team members.	AI Builder Power Virtual Agents Sales Insights

Explanation:
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

QUESTION 266
Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.
After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.
A company uses Dynamics 365 Sales.
You create a playbook to send documents to new sales managers.
You need to configure the system to record all activity associated with each playbook.
Solution: Create a Power Automate flow to track the activities.
Does the solution meet the goal?

A. Yes
B. No

Answer: B
Explanation:
Activity tracking is enabled in the Playbook template.
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/track-playbook-activities

QUESTION 267
Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.
After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.
A company uses Dynamics 365 Sales.
You create a playbook to send documents to new sales managers.
You need to configure the system to record all activity associated with each playbook.
Solution: Enable auditing on for the Playbook Activity entity.
Does the solution meet the goal?

A. Yes
B. No

Answer: B
Explanation:
Activity tracking is enabled in the Playbook template.
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/track-playbook-activities

QUESTION 268
Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.
After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.
A company uses Dynamics 365 Sales.
You create a playbook to send documents to new sales managers.
You need to configure the system to record all activity associated with each playbook.
Solution: Enable the playbook in Playbook settings.
Does the solution meet the goal?

A. Yes
B. No

Answer: B
Explanation:
Activity tracking is enabled in the Playbook template.
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/track-playbook-activities

QUESTION 269
Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.
After you answer a question in this section, you will NOT be able to return to it. As a result, these questions

will not appear in the review screen.
A company uses Dynamics 365 Sales.
You create a playbook to send documents to new sales managers.
You need to configure the system to record all activity associated with each playbook.
Solution: Edit the playbook template and set the value of the Track Progress option to yes.
Does the solution meet the goal?

A. Yes
B. No

Answer: A
Explanation:
Activity tracking is enabled in the Playbook template.
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/track-playbook-activities

QUESTION 270
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

Answer: CE
Explanation:
https://docs.microsoft.com/en-us/dynamics365/sales-professional/manage-teams

QUESTION 271
Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.
After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.
You are configuring Dynamics 365 Sales for a US-based company as follows:
- Utah to California is the West territory
- Illinois to Colorado is the Central territory.
- Maine to Indiana is the East territory.
The company wants the territories set up as follows:
- Salespersons 1 and 2 sell in the West territory.
- Salespersons 5 and 6 sell in the Central territory.
- Salespersons 3 and 4 sell in the East territory.
- Postal code for each state used as the location.
You need to set up the territories.
Solution:
- Create the West territory, add the manager, and save.
- Repeat for the Central and East territories.
- Add the members for each territory.
- Select Related under each territory and select the postal codes applicable for each territory.
Does the solution meet the goal?

A. Yes
B. No

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

QUESTION 272
Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.
After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.
You are configuring Dynamics 365 Sales for a US-based company as follows:
- Utah to California is the West territory
- Illinois to Colorado is the Central territory.
- Maine to Indiana is the East territory.
The company wants the territories set up as follows:
- Salespersons 1 and 2 sell in the West territory.
- Salespersons 5 and 6 sell in the Central territory.
- Salespersons 3 and 4 sell in the East territory.
- Postal code for each state used as the location.
You need to set up the territories.
Solution:
- Create the West territory, add the manager, and save.
- Repeat for the Central and East territories.
- Add the members for each territory.
- Select Related and add the Resource territories.
Does the solution meet the goal?

A. Yes
B. No

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

QUESTION 273
Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.
After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.
You are configuring Dynamics 365 Sales for a US-based company as follows:
- Utah to California is the West territory
- Illinois to Colorado is the Central territory.
- Maine to Indiana is the East territory.
The company wants the territories set up as follows:
- Salespersons 1 and 2 sell in the West territory.
- Salespersons 5 and 6 sell in the Central territory.
- Salespersons 3 and 4 sell in the East territory.
- Postal code for each state used as the location.
You need to set up the territories.

Solution:

```
- Create the West territory, add the manager.
- Add members for each territory and save.
- Repeat for the Central and East territories.
- Add connections to each territory.
```

Does the solution meet the goal?

A. Yes
B. No

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

QUESTION 274
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

QUESTION 275
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.

Answer: A
Explanation:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/create-edit-quote-sales
https://ellipsesolutions.com/dynamics-365-sales-managing-customer-quotes/

QUESTION 276
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
Explanation:

https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/change-product-parent

QUESTION 277
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

QUESTION 278
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
Explanation:
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