

> Vendor: Microsoft

> Exam Code: MB-210

**Exam Name: Microsoft Dynamics 365 for Sales** 

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#### **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.

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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:



**One Time!** 

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.

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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.

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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



**One Time!** 

D. Team description

E. Business unit name

Answer: CE Explanation:

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

#### **QUESTION 271**

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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**

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- 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.

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**One Time!** 

- 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**

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You are configuring Dynamics 365 Sales for a US-based company as follows:

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#### 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



**One Time!** 

#### **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



**One Time!** 

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

#### **QUESTION 279**

**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** 



#### Answer:

**Answer Area** 



#### **Explanation:**

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

#### **QUESTION 280**

**Drag and Drop Question** 

You manage a Dynamics 365 for Sales environment.

You need to email the sales manager when salespeople update their phone call activities.

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

One Time!

### Actions

### **Answer Area**

Configure Automatic Record Creation and Update Rules.

Open System Jobs.

Open Business Management





Open Settings.

Open Data Management.

#### Answer:

## Actions

## **Answer Area**

Open Settings.

Open System Jobs.

Open Business Management



Configure Automatic Record Creation and Update Rules.



Open Data Management.

#### **QUESTION 281**

**Drag and Drop Question** 

You are a Dynamics 365 Sales administrator.

You need to ensure that each salesperson can perform the following tasks when new leads are added to the system:

- Create an appointment
- Add documentation.



**One Time!** 

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

**Answer Area** 

	Action		Answer Area	
	Add steps to stage.			
	Add activities.			
	Publish the solution.	]		
	Choose Business Process Flow.	0		$\bigcirc$
	Add Playbook templates.	(>)		$\check{\otimes}$
	Choose App Settings.			
	Add a stage.			
	Activate processes.			
Answer:	Action		Answer Area	
	Add steps to stage.		Choose App Settings.	
			Add Playbook templates.	
			Add activities.	
	Choose Business Process Flow.	(	Publish the solution.	$\bigcirc$
		(S)		ŏ
		_		
	Add a stage.			
	Activate processes.			

### **Explanation:**

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

### **QUESTION 282**

**Hotspot Question** 

A salesperson has an active quote for a customer.

The customer wants to add one product to the quote and remove one product from the quote.

You need to make the changes.

**One Time!** 

What should you do? To answer, select the appropriate options in the answer area. NOTE: Each correct selection is worth one point.

### **Answer Area**

Change request	Status				
Add a product.		•			
	Set the status to Inactive.				
	Close the quote, update the products, and reactivate the quote.				
	Revise the quote, update the products, and reactivate the quo				
Delete a product.		•			
	Update the products in the Active state.				
	Close the quote, update the products, and reactivate the quote.				
	Revise the quote, update the products, and reactivate the quote	ote.			

#### Answer:

### **Answer Area**

Change request	Status				
Add a product.		•			
	Set the status to Inactive.				
	Close the quote, update the products, and reactivate the quote.				
	Revise the quote, update the products, and reactivate the quo	ote.			
Delete a product.		•			
	Update the products in the Active state.				
	Close the quote, update the products, and reactivate the quot	te.			
	Revise the quote, update the products, and reactivate the quo	ote.			

#### **Explanation:**

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