QUESTION 283
Hotspot Question
A company uses Dynamics 365 Sales. You add the Kanban control to the Opportunity entity.
You plan to implement Kanban views in the system. The implementation must accomplish the following:
‧ Set up opportunities so they are visible in Kanban views.
‧ Ensure that the default view displays the opportunities in the sales cycle.
‧ Ensure that users know how to change the status in the Kanban status view without opening the full record.
You need to complete the Kanban setup.
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
Set up Kanban.	In App Settings, select the correct setting.
	On the View menu, select the correct view.
	In Advanced settings, select the correct setting.
	On the command bar, select Show As, and then select the correct setting.
View the opportunities in the sales cycle.	Change the Kanban type to Status.
	Change the view to All Opportunities.
	Change the view to Partner Opportunities.
	Change the Kanban type to a business process flow.
Change the status to the same status view.	Drag the opportunity to another column.
	Create a new opportunity with the correct status.
	Drag the opportunity to the bottom of the column.
	Create a lead and quality the lead with the new status.

Answer:

Answer Area

Requirement	Action
Set up Kanban.	▼
	In App Settings, select the correct setting.
	On the View menu, select the correct view.
	In Advanced settings, select the correct setting.
	On the command bar, select Show As, and then select the correct setting.
View the opportunities in the sales cycle.	▼
	Change the Kanban type to Status.
	Change the view to All Opportunities.
	Change the view to Partner Opportunities.
	Change the Kanban type to a business process flow.
Change the status to the same status view.	▼
	Drag the opportunity to another column.
	Create a new opportunity with the correct status.
	Drag the opportunity to the bottom of the column.
	Create a lead and quality the lead with the new status.

Explanation:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/opportunity-kanban-view

QUESTION 284
Drag and Drop Question
You are a Dynamics 365 Sales consultant.
A customer asks you to create a main form for contacts. The form must include the following information:
· account name and phone number
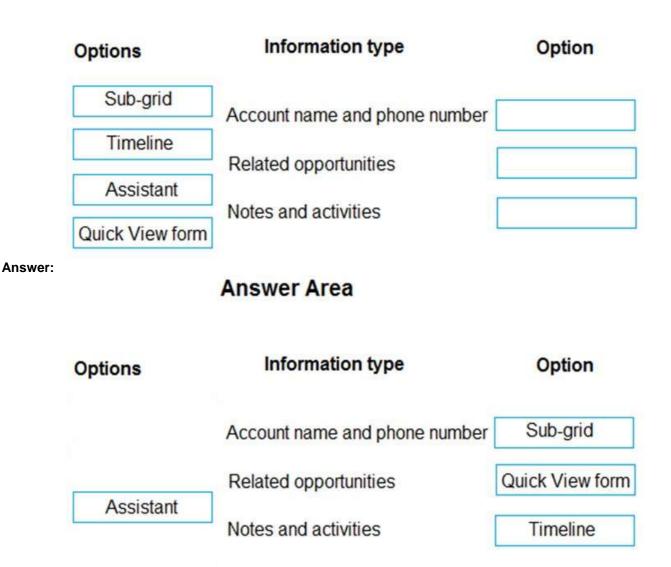
· related opportunities

· notes and activities
You need to configure the form.
Which options should you use? To answer, drag the appropriate options to the correct information. Each option 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 Area

Options	Information type	Option
Sub-grid	Account name and phone number	
Timeline	Related opportunities	
Assistant	Notes and activities	
Quick View form		

Answer:

Answer Area

Options	Information type	Option
	Account name and phone number	Sub-grid
	Related opportunities	Quick View form
Assistant	Notes and activities	Timeline

Explanation:
https://docs.microsoft.com/en-us/powerapps/maker/model-driven-apps/quick-view-control-properties-legacy
https://docs.microsoft.com/en-us/powerapps/maker/model-driven-apps/set-up-timeline-control

QUESTION 285
Hotspot Question
A company is implementing Dynamics 365 Sales.
The solution must support a new standardized sales process. The process must be the same for both new and existing customers.
‧ Sales representatives must follow up on email inquiries about products within 24 hours.
‧ The time it takes for sales representatives to follow up on inquiries must be reportable.
‧ All quotes for new customers must be reviewed and approved by the sales manager for specific criteria.
You need to configure playbooks to meet the requirements.
What should you do? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Answer Area

Requirement	Action
Follow-up contact	▼
	Add an activity.
	Add a business rule.
	Add a playbook category.
Sales Manager checklist	▼
	Add the document to the activity.
	Add the document as a quote template.
	Add the document to the business rule.

Answer:

Answer Area

Requirement	Action
Follow-up contact	▼
	Add an activity.
	Add a business rule.
	Add a playbook category.
Sales Manager checklist	▼
	Add the document to the activity.
	Add the document as a quote template.
	Add the document to the business rule.

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

QUESTION 286
Drag and Drop Question
You manage Dynamics 365 Sales. You have a sales territory named SalesTerritoryA, which has an associated manager.
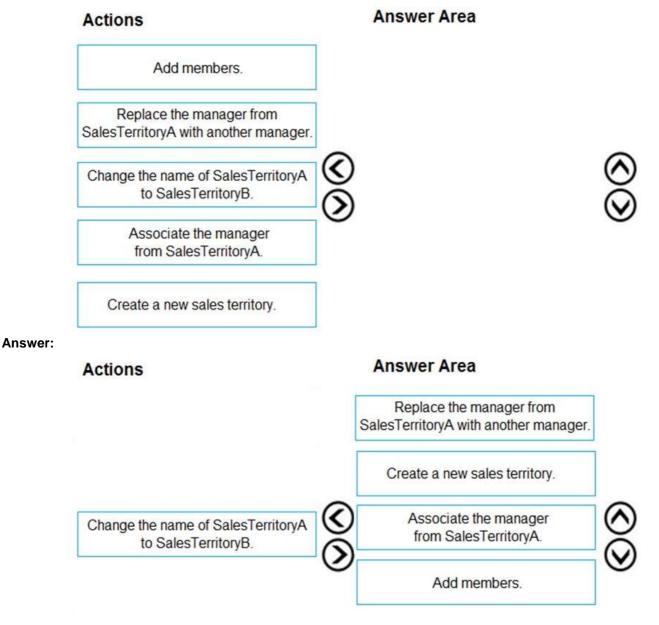You need to create a new sales territory named SalesTerritoryB and assign the SalesTerritoryA manager to

SalesTerritoryB.

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.

NOTE: More than one order of answer choices is correct. You will receive credit for any of the correct orders you select.

Actions

- Add members.
- Replace the manager from SalesTerritoryA with another manager.
- Change the name of SalesTerritoryA to SalesTerritoryB.
- Associate the manager from SalesTerritoryA.
- Create a new sales territory.

Answer Area

Answer:

Actions

- Change the name of SalesTerritoryA to SalesTerritoryB.

Answer Area

- Replace the manager from SalesTerritoryA with another manager.
- Create a new sales territory.
- Associate the manager from SalesTerritoryA.
- Add members.

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

QUESTION 287
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 use business process flows for all Dynamics 365 opportunities.
Some opportunities are closed before business process flow durations are calculated.
You need to ensure that business process flow duration values are calculated.
Solution: At any stage in the business process flow prior to the final stage, select **Finish**.
Does the solution meet the goal?

A. Yes
B. No

Answer: A
Explanation:
https://www.itaintboring.com/dynamics-crm/dynamics-how-process-duration-is-calculated/

QUESTION 288
SIMULATION
Please wait while the virtual machine loads. Once loaded, you may proceed to the lab section. This may take a few minutes, and the wait time will not be deducted from your overall test time.
When the Next button is available, click it to access the lab section. In this section, you will perform a set of tasks in a live environment. While most functionality will be available to you as it would be in a live environment, some functionality (e.g., copy and paste, ability to navigate to external websites) will not be possible by design.
Scoring is based on the outcome of performing the tasks stated in the lab. In other words, it doesn't matter how you accomplish the task, if you successfully perform it, you will earn credit for that task.
Labs are not timed separately, and this exam may have more than one lab that you must complete. You can use as much time as you would like to complete each lab. But, you should manage your time appropriately to ensure that you are able to complete the lab(s) and all other sections of the exam in the time provided.
Please note that once you submit your work by clicking the Next button within a lab, you will NOT be able to return to the lab.
A sales manager requests to view all the closed opportunities by source campaigns. The manager wants the visual formatted as a stacked bar comparison of which closed opportunities are won versus lost.
You need to configure your environment to provide access to the visual. You must name the visual `Opportunities Won vs. Lost by Campaign.`
To complete this task, sign in to the Dynamics 365 portal.
Answer: See explanation below.
Explanation:
1. Create a new chart.
2. Select bar chart.
3. Name the chart `Opportunities Won vs. Lost by Campaign.`
4. Select the Opportunities view to be used by the chart.
5. Configure the Legend Entries for Opportunities Won and Opportunities Lost by source campaigns.
6. Click Save & Close.

QUESTION 289
SIMULATION
Please wait while the virtual machine loads. Once loaded, you may proceed to the lab section. This may take a few minutes, and the wait time will not be deducted from your overall test time.
When the Next button is available, click it to access the lab section. In this section, you will perform a set of tasks in a live environment. While most functionality will be available to you as it would be in a live environment, some functionality (e.g., copy and paste, ability to navigate to external websites) will not be possible by design.
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You need to create a copy of Sales Dashboard and name the dashboard `Sales Dashboard 2`. The new dashboard must NOT include a view that displays the activities widgets.
To complete this task, sign in to the Dynamics 365 portal.
Answer: See explanation below.
Explanation:
1. Navigate to Dashboards.
2. Open the Sales Dashboard.
3. Click Save As and enter the name `Sales Dashboard 2` to save a copy of the dashboard.
4. Click Edit.
5. Select the view that displays the activities widgets.
6. Click Remove
7. Click Save.

QUESTION 290
You cancel an order in Dynamics 365 Sales by mistake.
You need to mark the order status as fulfilled instead of cancelled.
What should you do?

A. Change the order status fulfilled.
B. Activate the order and change the order status to fulfilled.
C. Recreate the order.
D. Add the products back in to the original order.

Answer: C
Explanation:
https://docs.microsoft.com/en-us/dynamics365/sales-professional/create-orders-sp

QUESTION 291
A company uses Dynamics 365 Sales.
You need to add an email activity to both a contact and its corresponding account without setting the Regarding field.
Where should you add the email activity?

A. Dynamics 365 App for Outlook
B. Quick Create form
C. Account record only
D. Contact record only

Answer: D

QUESTION 292
Hotspot Question
A company uses Dynamics 365 Sales. The company does not use any customizations.
The system must create activity records for every interaction a salesperson has with customers and contacts.
You need to configure the system by using minimal customizations.
How should you configure the system? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Answer Area

Activity	Action
Display activities for each contact in the account record.	▼
	Use the default configuration.
	Create a custom relationship between the activity and the contact.
	Add the activity to both the account and contact.
	Create a Power Automate flow to copy the activity from the contact to the account.
Ensure the creation date and the completion date of the activity are recorded separately.	▼
	Use the default configuration.
	Create a custom column for the creation date.
	Create a custom column for the completion date.
	Create a custom control.
View activities in Kanban view.	▼
	Use the default configuration.
	Add a custom control.
	Add a custom view.
	Add a Power Automate flow.

Answer:

Answer Area

Activity	Action
Display activities for each contact in the account record.	▼
	Use the default configuration.
	Create a custom relationship between the activity and the contact.
	Add the activity to both the account and contact.
	Create a Power Automate flow to copy the activity from the contact to the account.
Ensure the creation date and the completion date of the activity are recorded separately.	▼
	Use the default configuration.
	Create a custom column for the creation date.
	Create a custom column for the completion date.
	Create a custom control.
View activities in Kanban view.	▼
	Use the default configuration.
	Add a custom control.
	Add a custom view.
	Add a Power Automate flow.

Explanation:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/activity-kanban-view

QUESTION 293
You are a Dynamics 365 Sales administrator for a car dealership. You create a custom Service entity.
Salespeople must be able to see all related appointments in the timeline. A salesperson creates an appointment but is unable to see any Service records available in the Regarding field. Salespeople have permission to view service record.
You need to ensure that the salesperson is able to connect the appointment to the service.
What should you do?

A. Create a connection to the Service record.

B.   Add a timeline to the Service form.
C.   Enable activities on the Service entity.
D.   Assign privileges to Activities.

Answer: C
Explanation:
https://docs.microsoft.com/en-us/dynamics365/outlook-app/enable-a-custom-entity-to-appear-in-the-regarding-lookup

QUESTION 294
You close a lost opportunity. The company you lost the opportunity to is a competitor with whom you do business. The company is already set up with an account and competitor record in the system.
You want to track the lost opportunity without having to reopen the opportunity.
You need to track the company to the opportunity.
What should you do?

A.   Add the account to the opportunity.
B.   Add the competitor to the opportunity.
C.   Add the opportunity to the competitor.
D.   Add the opportunity to the account.

Answer: C
Explanation:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/create-edit-competitor-record-sales

QUESTION 295
A salesperson is viewing a My Activities list as a calendar.
The salesperson wants to change the status of a phone call by dragging an activity to a new status.
You need to ensure that the salesperson can switch their view type.
What should you do?

A.   Select **Show As** in the ribbon.
B.   Select **Create View** in the ribbon.
C.   Remove the Calendar control, and then add the Kanban control to the view.
D.   Add the Kanban control to the view.

Answer: A
Explanation:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/activity-kanban-view

QUESTION 296
Drag and Drop Question
A company uses Dynamics 365 Sales. You qualify a lead record.
Which record is created when you qualify a lead? To answer, drag the appropriate record types to the correct leads.
Each record type 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.
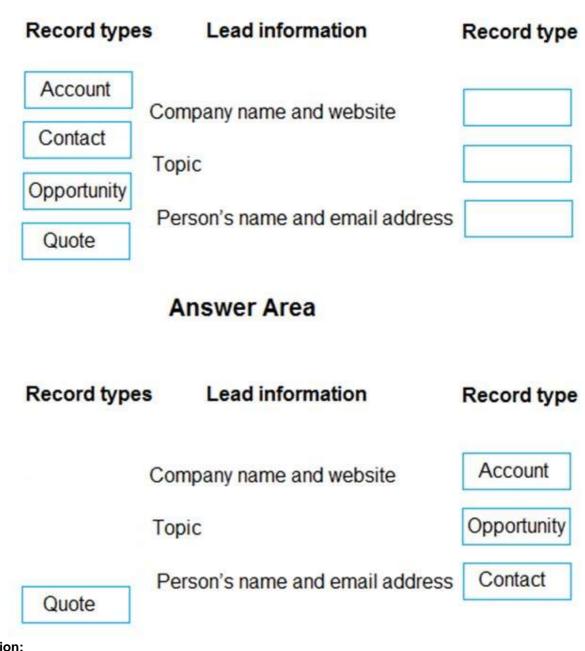**NOTE:** Each correct selection is worth one point.

Answer Area

Record types	Lead information	Record type
Account		
	Company name and website	
Contact		
	Topic	
Opportunity		
	Person's name and email address	
Quote		

Answer:

Answer Area

Record types	Lead information	Record type
	Company name and website	Account
	Topic	Opportunity
	Person's name and email address	Contact
Quote		

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

QUESTION 297
Hotspot Question
A company uses Dynamics 365 Sales to track activities. The sales department plans to use leads.
You need to determine:
· Which activities convert to leads.
· Which field carries over from the activity to the lead.
Which feature should you use? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Answer Area

Requirement	Feature
Which activity type can users convert to leads?	▼ Task / Email / Phone Call / Appointment
Which field carries over from the activity to the lead?	▼ Subject / Regarding / Start Date / Existing Contact

Answer:

Answer Area

Requirement	Feature
Which activity type can users convert to leads?	▼ Task / **Email** / Phone Call / Appointment
Which field carries over from the activity to the lead?	▼ **Subject** / Regarding / Start Date / Existing Contact

Explanation:
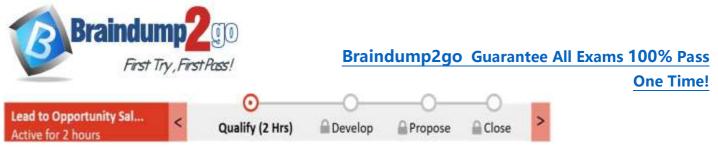https://community.learnmsdynamics.com/post/how-to-create-leads-in-microsoft-dynamics-365-5f157032469b481ed3ad3caa

QUESTION 298
Drag and Drop Question
A salesperson progresses through the Lead to Opportunity sales process.

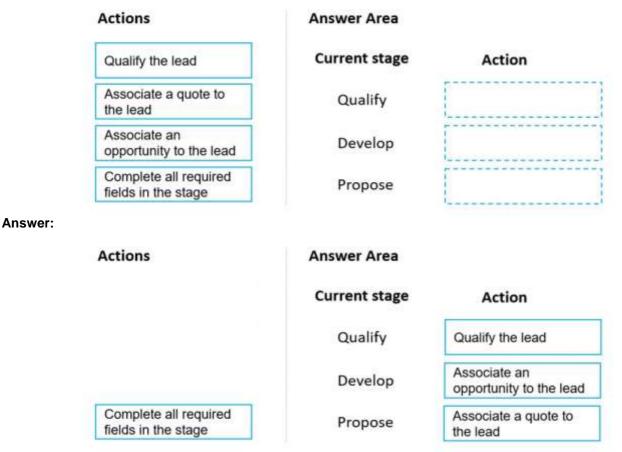You need to identify what needs to be completed to enter the next stage.
Which action should you perform to advance the business process to each subsequent stage? To answer, drag the appropriate actions to the correct stages. Each action may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.
NOTE: Each correct selection is worth one point.

Answer:

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

QUESTION 299
SIMULATION
Please wait while the virtual machine loads. Once loaded, you may proceed to the lab section. This may take a few minutes, and the wait time will not be deducted from your overall test time.
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Please note that once you submit your work by clicking the Next button within a lab, you will NOT be able to return to the lab.
Your company plans to generate a report to provide reasons for the disqualification of leads.

You need to add a reason of `Cannot meet timeline for delivery` and then apply the reason to a Sales Lead named Brian LaMee.
To complete this task, sign in to the Dynamics 365 portal.
Answer: See explanation below.
Explanation:
1. Navigate to **Settings** > **Customization** > **Customize the System**.
2. Expand the **Entities** menu.
3. Scroll down and expand **Leads**, then click on **Fields**.
4. Double click on the **Status Reason** field.
5. Change status to **Disqualified.**
6. Click **Add.**
7. Type in the new status reason: `Cannot meet timeline for delivery`
8. Click **OK.**
9. Click **Publish All Customizations.**
10. Open the lead named Brian LaMee.
11. From the command bar, click **Disqualify** and select the new status reason.
Reference:
https://www.azamba.com/2018/08/16/how-to-add-a-reason-to-disqualify-a-lead-in-microsoft-dynamics-365-for-sales-crm

QUESTION 300
SIMULATION
Please wait while the virtual machine loads. Once loaded, you may proceed to the lab section. This may take a few minutes, and the wait time will not be deducted from your overall test time.
When the Next button is available, click it to access the lab section. In this section, you will perform a set of tasks in a live environment. While most functionality will be available to you as it would be in a live environment, some functionality (e.g., copy and paste, ability to navigate to external websites) will not be possible by design.
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Please note that once you submit your work by clicking the Next button within a lab, you will NOT be able to return to the lab.
You gather information from a prospect named Cat Francis to qualify the prospect as a new sales opportunity.
You need to identify the prospect, complete all the required fields, and qualify the prospect in the sales process.
To complete this task, sign in to the Dynamics 365 portal.
Answer: See explanation below.
Explanation:
You need to create a lead and qualify the lead.
1. Navigate to Leads.
2. Click New.
3. In the Qualify stage of the process bar, select the contact named Cat Francis. When you select an existing contact while creating a lead record, the following information is automatically populated in the Lead form: First Name, Last Name, Job Title, Business Phone, Mobile Phone and Email.
4. Click Save.
5. In the Lead record, click the Qualify button in the toolbar. This will convert the lead to an opportunity.
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales/create-edit-lead-sales