- **Vendor:** Microsoft
- **Exam Code:** MB-210
- **Exam Name:** Microsoft Dynamics 365 for Sales
- **New Updated Questions from** Braindump2go **(Updated in** Oct./2020**)**

QUESTION 130
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 ensure that sales numbers reflect the accounting calendar.
What should you configure?

A. Rollup Queries
B. Business Closures
C. Sales Territories
D. Fiscal Year Settings

Answer: D

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- UserA is unable to qualify leads.
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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.

You need to determine which fields are required when opportunities are marked as lost.
Which fields are required?

A. Status and Stakeholders
B. Status and Contact
C. Status Reason and Competitor
D. Status Reason and Description

Answer: C

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Hotspot Question
You need to configure the system for incoming email to support creation of leads from email 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
Create leads from incoming emails	Create a Queue and Record Creation Rule Create a Workflow for incoming emails Create an Action to trigger a plug-in
Do not create contacts from emails from unknown senders	Disable Create records for emails from unknown senders Enable duplicate detection rules for emails Disable duplicate detection rules for leads Enable Create Lead in email tracking

Answer:

Answer Area

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Explanation:
https://docs.microsoft.com/en-us/dynamics365/customer-service/set-up-rules-to-automatically-create-or-update-records

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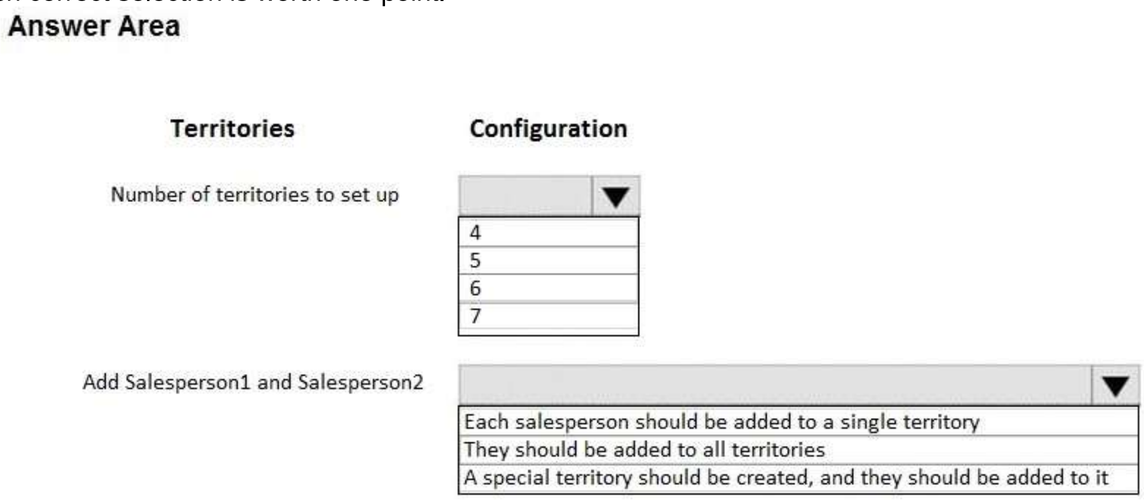
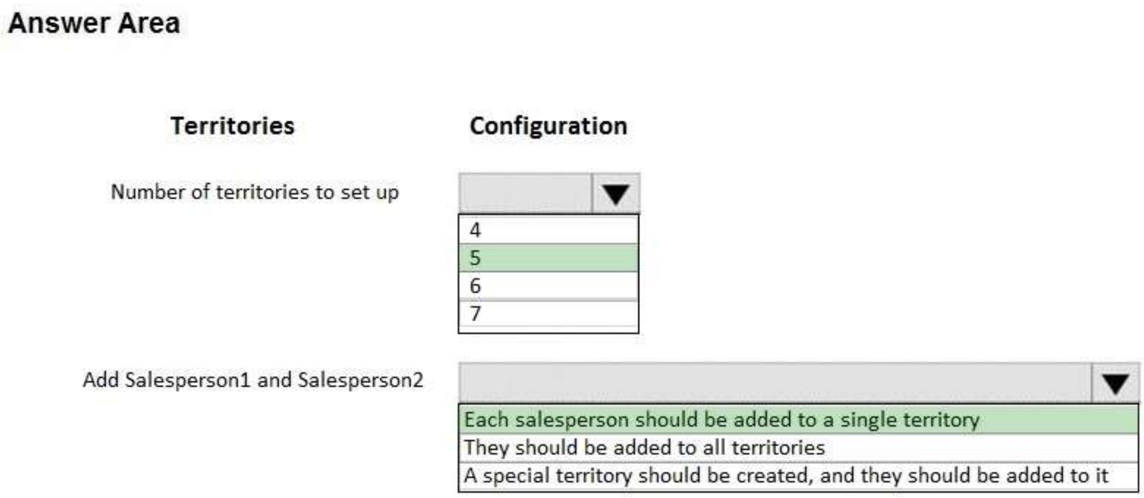
Hotspot Question
You need to configure territories and membership.
Which configurations should you use? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.



Answer:



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

QUESTION 134
Case Study 2 - Bellows College
Background
Bellows College has several sports teams. Sporting events take place throughout the year. Processes for managing and selling tickets to events are very outdated. The college uses Microsoft Excel to track who has paid for each private box seat for each season. The college uses a paper-based system to manage individual ticket sales. Bellows often loses money on ticket sales due to lack of accurate purchasing information.
The college currently does not support ticket sales on the day of a sporting event. All tickets must be purchased in advance.
Bellows College plans to streamline processes for selling tickets to sporting events. The organization needs an updated system that will support internal sales people and track all ticket sales for a season.
Sales team
Bellows College has inside phone sales representatives and regional sales representatives that are assigned to specific sales territories. Inside phones sales representatives primarily handle individual cash or credit card ticket sales. Regional sales representatives primarily handle group and private box sales. Phone inquiries for group and private box sales are entered into the system and assigned to the appropriate regional representative.
Dynamics 365
Bellows College has purchased Microsoft Dynamics 365 Sales to help manage their ticket sales. You are hired to configure the system to meet the college's needs.
The college has identified the following requirements for the new system:
- Enforce repeatable steps to promote and increase efficiency and consistency for ticket sales across all sports and venues.
- Calculate sales margins based on base ticket prices with discounts for group and alumni sales.
- Maximize private box sales.
- Provide visibility into all potential and pending sales.
- Track and report follow up activities performed by all sales representatives.

Current processes
Ticket sales
Ticket sales are completed and displayed based on the college's fiscal year which begins July 1 and ends June 30. Ticket sales for existing customers will be entered as new opportunities for tracking and reporting purposes. To facilitate timely follow-up (and sales representative accountability), a phone call activity will be auto-generated every time a new opportunity is created.
Ticket sales for new customers will be entered in the solution as leads. Leads will have the following statuses: Open, Qualified, and Disqualified. Status values cannot be customized. Status values cannot be customized. Status reasons can be customized.
Ticket prices

The standard ticket price for all sporting events is $50. Non-alumni ticket purchases are priced based on the standard rate. Alumni ticket purchases are priced at the current cost. This season the current cost is $35 per ticket. All sports are priced on a markup, except for football. Football is priced based on a hard profit. The college has the following markup and margin policies for the three categories of ticket purchasers:

Purchaser	Markup	Margin
Alumni	10 percent	5 percent
Student	0 percent	0 percent
Non-alumni	0 percent	12 percent

Ticket package discounts are available for group purchases. The following table shows pricing:

# of Tickets for Group	Discount price/ticket
Alumni – 10	$33
Alumni – 20	$31
Alumni > 20	$30
Non-alumni – 10	$48
Non-alumni – 20	$45
Non- alumni > 20	$43

Private box seats

Because of the limited number of private box seats, private box seats sell out quickly. These seats are offered to current renters first, then alumni. Remaining box seat tickets are made available to others from year to year. The dean of the college has expressed the desire to personally call the CEOs or primary decision makers of groups to thank them for renewing their private box rentals.

Private box sales for existing customers will be entered as opportunities and converted to orders when finalized. Private box and group sales for new customers will be entered as leads and will follow a standardized sales process. To support reporting, pending new customer sales will go through a verification process using the stages New, Pending Approval, Approved.

Requirements

Accounting

Budgets and taxes must be tracked over an annual accounting period. The name of the accounting period must be displayed based upon the July 1 date. The accounting period must support abbreviations and must be divisible into four quarters.

Invoices must include:

- Price List Products: Products tied to a price list
- Non-catalog Products: Existing products not part of the product catalog
- Opportunity Products: Products from a previously created opportunity
- Product prices on the invoice can be changed at the salesperson's discretion

System configuration

The system must be set up as follows:

- Individual cash and credit cards sales will be entered as orders in the system.
- New opportunities will automatically generate a required phone call activity for the assigned sales representative to be completed within 5 days. Valid outcomes of the call will be set to Connected, Left Message, and Wrong Number when closed.
- Non-renewals of private box rentals should be designated with the following outcomes for tracking and reporting purposes: Not interested, Budget cuts, No Longer in business, Other. If Other is chosen, the sales representative must provide additional information in the provided text box.

Tickets

The ticket manager must be able to create discounts for volume purchases of tickets for either groups or bundles of games.

The ticket manager must be able to calculate the best margins for ticket sales. They need to calculate prices as percentage of costs.

Reporting

The school's athletic director needs a fiscal year report that includes specific formatting based on a defined template. The report must contain a chart that displays the type of ticket purchaser (alumni, non-alumni, and student).
All sales reporting must be completed by using Dynamics 365 for Sales. Bellows College has purchased the online version of the Sales Content Pack for BI to allow for visualizations and the creation of dashboards for ticket sales. The sales team needs to use a secured connection to access the Bellows College Power BI dashboard.
Sales team members need the following report types to meet reporting needs:

Report	Report description
Orders	Provides a view of ticket orders and line items.
Discounts by Number of Employees	Provides a custom report to display discounts provided based upon number of employees within a customer organization.
Standings Report	Provides a report hosted by a third party of current team standings.
Branding Report	Provides images of team logos and fonts. This report never changes.
Mobile Salesperson Report	Provides the ability to create PivotTables for mobile sales team members when connected to a network.

Problem statements
The sales manager is concerned with the lack of sales from one of the sales representatives in comparison to the other sales representatives. The legacy system does not provide enough data to allow the manager to give proper feedback or guidance.
The sales manager has received emails from a potential private box customer named Contoso, Ltd. confirming that they have not had any contact from any sales representative even though they are ready to purchase group tickets.
You need to create a chart for the athletic director.
What should you do?

A. Use purchaser, markup, and margin on the X-axis. Use amount of sales on the Y-axis.
B. Use the ticket type as the X-axis. Use amount of sales on the Y-axis
C. Use the ticket type on the X-axis. Use margins multiplied by cost on Y-axis
D. Use discount price on the X-axis. Use the number of tickets for groups on the Y-axis.

Answer: B
Explanation:
The school's athletic director needs a fiscal year report that includes specific formatting based on a defined template. The report must contain a chart that displays the type of ticket purchaser (alumni, non-alumni, and student).

QUESTION 135
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You need to increase efficiency and consistency for ticket sales to meet company requirements.
What should you create?

A. a Microsoft Flow workflow

B. a playbook
C. a Lifecycle Services (LCS) package

Answer: B
Explanation:
Enforce repeatable steps to promote and increase efficiency and consistency for ticket sales across all sports and venues.
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/enforce-best-practices-playbooks