

➤ **Vendor: Microsoft**

➤ **Exam Code: MB-210**

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

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QUESTION 154

An order uses quote and order functionality in Dynamics 365 Sales. Multiple quotes may be provided to customers at one time. Quotes are revised often.

Which two opportunities can you close as won? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

- A. an opportunity that has quotes in the draft status
- B. an opportunity that has quotes in the won status
- C. an opportunity that has quotes in the active status
- D. an opportunity that has quotes in the revised status reason

Answer: BC

QUESTION 155

A company uses Dynamics 365 Sales to create and manage opportunities, quotes and orders.

You need to ensure that the Actual Revenue field in an opportunity is automatically updated with the total amount from the quote.

What should you do?

- A. Convert the quote to an order. Set the value of the Calculate actual revenue from quotes option to Yes.
- B. Close the opportunity as won.
- C. Convert the quote to an order. Set the value of the Close Opportunity option to Yes.
- D. Convert the quote to an order. Set the value of the Close Opportunity option to No.

Answer: B

Explanation:

<https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/close-opportunity-won-lost-sales>

QUESTION 156

You manage a Dynamics 365 environment. Salespeople use a template from the Sales Hub to create quotes.

A member of the sales team requests that you change the order in which columns display in customer quotes.

You need to modify the quote template.

What should you use?

- A. template editor
- B. mail merge template
- C. Microsoft Word template
- D. Report Wizard

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<https://www.braindump2go.com/mb-210.html>

Answer: C

QUESTION 157

You are a system customizer in Dynamics 365 Sales.
You need to set up product families.
Which option is available?

- A. Create a maximum of 10 child product families
- B. Set a product bundle as a parent of a product family
- C. Add the product to multiple product families
- D. Set a product property as an option set

Answer: D

Explanation:

<https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/use-properties-describe-product>

QUESTION 158

A company uses Dynamics 365 Sales.
You attempt to add a product to an order, but the product cannot be located.
You need to determine why the product is missing.
What is the cause?

- A. The product was not published
- B. The product is missing required information
- C. The write-in option was not used
- D. The product was not listed in the quote

Answer: A

QUESTION 159

You are a Dynamics 365 Sales administrator for an organization.
The organization is no longer going to sell a product in the product catalog.
You need to ensure that the product is no longer available for selection by sales staff.
What should you do?

- A. Retire the product
- B. Edit the name
- C. Delete the product

Answer: A

Explanation:

<https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/retire-product>

QUESTION 160

Hotspot Question

You have a dashboard that shows the number of completed calls and cancelled calls in a chart. Sales Representatives mark completed calls by using one of the following values: Wrong Number, Left Message, or Connected.
You need to update the dashboard to display wrong phone numbers.

How should you make the modification? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Answer Area

Requirement

Value or action

Modification to make

	▼
Use a filter	
Alter the existing chart	
Create a new chart	

Value to use

	▼
Status	
Status Reason	
Completed	

Answer:

Answer Area

Requirement

Value or action

Modification to make

	▼
Use a filter	
Alter the existing chart	
Create a new chart	

Value to use

	▼
Status	
Status Reason	
Completed	

QUESTION 161

Hotspot Question

You manage a Dynamics 365 Sales environment.

You need to create a dashboard that lists customers and their activities. The dashboard must include tiles that are permanently displayed.

How should you configure the dashboard? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Answer Area

Element	Value
Type	<div style="border: 1px solid gray; padding: 2px;">▼</div> <div style="border: 1px solid gray; padding: 2px;">Interactive Experience Dashboard Dashboard</div>
Stream	<div style="border: 1px solid gray; padding: 2px;">▼</div> <div style="border: 1px solid gray; padding: 2px;">Single stream Multi stream</div>
Creation location	<div style="border: 1px solid gray; padding: 2px;">▼</div> <div style="border: 1px solid gray; padding: 2px;">Home page Entity</div>

Answer:

Answer Area

Element	Value
Type	<div style="border: 1px solid gray; padding: 2px;">▼</div> <div style="border: 1px solid gray; padding: 2px; background-color: #e0ffe0;">Interactive Experience Dashboard Dashboard</div>
Stream	<div style="border: 1px solid gray; padding: 2px;">▼</div> <div style="border: 1px solid gray; padding: 2px; background-color: #e0ffe0;">Single stream Multi stream</div>
Creation location	<div style="border: 1px solid gray; padding: 2px;">▼</div> <div style="border: 1px solid gray; padding: 2px; background-color: #e0ffe0;">Home page Entity</div>

Explanation:

<https://docs.microsoft.com/en-us/dynamics365/customerengagement/on-premises/customize/configure-interactive-experience-dashboards>

QUESTION 162

Hotspot Question

An organization uses Dynamics 365 Sales to manage customer relationships.

When a potential customer submits an email inquiry, the system must create a lead record and send a response.

You need to ensure that a lead record is created for the potential customer and a reply email is sent.

How should you configure the environment? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Answer Area

Requirement	Action
Ensure an auto response is sent.	<div style="border: 1px solid black; padding: 2px;">▼</div> <div style="border: 1px solid black; padding: 2px;">Configure a record creation and update rule</div> <div style="border: 1px solid black; padding: 2px;">Configure a business process flow</div>
Create a lead	<div style="border: 1px solid black; padding: 2px;">▼</div> <div style="border: 1px solid black; padding: 2px;">Specify auto-response settings</div> <div style="border: 1px solid black; padding: 2px;">Specify conditions for record creation</div>

Answer:

Answer Area

Requirement	Action
Ensure an auto response is sent.	<div style="border: 1px solid black; padding: 2px;">▼</div> <div style="border: 1px solid black; padding: 2px; background-color: #e0ffe0;">Configure a record creation and update rule</div> <div style="border: 1px solid black; padding: 2px;">Configure a business process flow</div>
Create a lead	<div style="border: 1px solid black; padding: 2px;">▼</div> <div style="border: 1px solid black; padding: 2px;">Specify auto-response settings</div> <div style="border: 1px solid black; padding: 2px; background-color: #e0ffe0;">Specify conditions for record creation</div>

Explanation:

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

QUESTION 163

Drag and Drop Question

You are a Dynamics 365 Sales administrator.

You need to review an interactive dashboard for Accounts in the Sales Hub.

For each scenario, which filter type should you use? To answer, drag the appropriate filter type to the correct scenario.

Each source 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.

Filter types

- Timeframe filter
- Visual filter
- Global filter



Answer Area

Scenario

- View accounts based on case priority
- View accounts created in the last three months
- View accounts by Created On dates

Filter Type

- Filter type
- Filter type
- Filter type

Answer:

Filter types

- Visual filter
- Timeframe filter
- Global filter



Answer Area

Scenario

- View accounts based on case priority
- View accounts created in the last three months
- View accounts by Created On dates

Filter Type

- Visual filter
- Timeframe filter
- Global filter

Explanation:

<https://docs.microsoft.com/en-us/dynamics365/customer-service/customer-service-hub-user-guide-dashboard>

QUESTION 164

Drag and Drop Question

A company wants to use Dynamics 365 Sales with their internal phone system.

You need to configure Dynamics 365 to use the softphone dialer.

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

- Configure the channel provider
- Download and import the Dynamics 365 Channel Integration Framework
- Enable for mobile client
- Set up server-side synchronization
- Navigate to the Channel Integration Framework application
- Enable Microsoft Teams integration

Answer Area

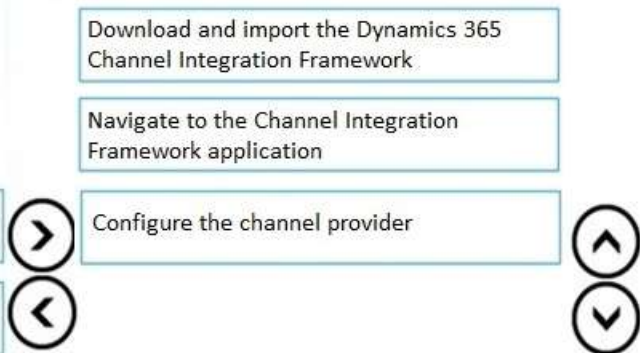


Answer:

Actions

- Download and import the Dynamics 365 Channel Integration Framework
- Navigate to the Channel Integration Framework application
- Enable for mobile client
- Set up server-side synchronization
- Configure the channel provider
- Enable Microsoft Teams integration

Answer Area



Explanation:

<https://docs.microsoft.com/en-us/dynamics365/ai/sales/integrate-sample-softphone>
<https://docs.microsoft.com/en-us/dynamics365/customer-service/channel-integration-framework/configure-channel-provider-channel-integration-framework>

QUESTION 165

Hotspot Question

A company wants to implement the Forecast Management feature in Dynamics 365 Sales. The company plans to use the Opportunity Status Reason field to indicate that sales have closed. They want to use settings based on the organizational reporting structure. Salespeople must only see their own forecasts. You need to select the appropriate settings to meet the company's requirements. Which settings should you select? To answer, select the appropriate options in the answer area.
 NOTE: Each correct selection is worth one point.

Answer Area

Requirement

Setting

Hierarchical route

	▼
Owner	
User	
Contact	
Manager	

Permissions - User Lookup field

	▼
User	
Manager	
Created By	
None	

Answer:

Answer Area

Requirement

Setting

Hierarchical route

	▼
Owner	
User	
Contact	
Manager	

Permissions - User Lookup field

	▼
User	
Manager	
Created By	
None	

Explanation:

<https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/select-template-forecast>
<https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/provide-permissions-forecast>

QUESTION 166

Hotspot Question

A sales manager needs to set up goals in Dynamics 365 Sales for salespeople.
 The measurement of goals must be based on the total deal amount upon closing an opportunity.
 The fiscal year for the goals must be based on the calendar year.

You need to create the rollup query for the goal metrics.
Which options should you select? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Answer Area

Parameter	Option										
Entity	<table border="1"><tr><td></td><td>▼</td></tr><tr><td colspan="2">Lead</td></tr><tr><td colspan="2">Quote</td></tr><tr><td colspan="2">Opportunity</td></tr><tr><td colspan="2">Invoice</td></tr></table>		▼	Lead		Quote		Opportunity		Invoice	
	▼										
Lead											
Quote											
Opportunity											
Invoice											
Date field	<table border="1"><tr><td></td><td>▼</td></tr><tr><td colspan="2">Actual Close Date</td></tr><tr><td colspan="2">Created on Date</td></tr><tr><td colspan="2">Final Decision Date</td></tr></table>		▼	Actual Close Date		Created on Date		Final Decision Date			
	▼										
Actual Close Date											
Created on Date											
Final Decision Date											
Revenue field	<table border="1"><tr><td></td><td>▼</td></tr><tr><td colspan="2">Total Amount</td></tr><tr><td colspan="2">Budget Amount</td></tr><tr><td colspan="2">Actual Revenue</td></tr></table>		▼	Total Amount		Budget Amount		Actual Revenue			
	▼										
Total Amount											
Budget Amount											
Actual Revenue											

Answer:

Answer Area

Parameter	Option
Entity	<div style="border: 1px solid gray; padding: 2px;"> <div style="background-color: #f0f0f0; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> ▼ </div> <div style="padding: 2px;"> <p>Lead</p> <p>Quote</p> <p style="background-color: #d9ead3;">Opportunity</p> <p>Invoice</p> </div> </div>
Date field	<div style="border: 1px solid gray; padding: 2px;"> <div style="background-color: #f0f0f0; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> ▼ </div> <div style="padding: 2px;"> <p style="background-color: #d9ead3;">Actual Close Date</p> <p>Created on Date</p> <p>Final Decision Date</p> </div> </div>
Revenue field	<div style="border: 1px solid gray; padding: 2px;"> <div style="background-color: #f0f0f0; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> ▼ </div> <div style="padding: 2px;"> <p style="background-color: #d9ead3;">Total Amount</p> <p>Budget Amount</p> <p>Actual Revenue</p> </div> </div>

QUESTION 167

Hotspot Question

You use opportunities in Dynamics 365 Sales.

Opportunities that were closed as lost frequently come back and are eventually won.

You need to be able to track these occurrences and have insight into the process.

What happens during the reopen and close process? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Answer Area

Scenario	Result
A lost opportunity is reopened.	<div style="border: 1px solid gray; padding: 2px;"> <div style="background-color: #f0f0f0; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> ▼ </div> <div style="padding: 2px;"> <p>The Opportunity Close record is deleted</p> <p>The Opportunity Close record changes status to inactive</p> <p>The Opportunity Close record changes status to in Progress</p> </div> </div>
The same opportunity is closed as won.	<div style="border: 1px solid gray; padding: 2px;"> <div style="background-color: #f0f0f0; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> ▼ </div> <div style="padding: 2px;"> <p>The current Opportunity Close record updates with the new close details and status of completed.</p> <p>A new Opportunity Close record is created with the new close details and status of completed.</p> </div> </div>

Answer:

Answer Area

Scenario	Result
A lost opportunity is reopened.	<ul style="list-style-type: none"> The Opportunity Close record is deleted The Opportunity Close record changes status to inactive The Opportunity Close record changes status to In Progress
The same opportunity is closed as won.	<ul style="list-style-type: none"> The current Opportunity Close record updates with the new close details and status of completed. A new Opportunity Close record is created with the new close details and status of completed.

QUESTION 168

Drag and Drop Question

You are setting up a product catalog in Dynamics 365 Sales.

You need to set up the catalog using the least amount of effort.

In which order should you set up the catalog? To answer, drag the appropriate components to the correct order position. Each component 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.

Components

- Discount list
- Product family
- Unit groups
- Price lists

Answer Area

Create Order

- First
- Second
- Third
- Fourth

Component

- Component
- Component
- Component
- Component

Answer:

Components

- Discount list
- Product family
- Unit groups
- Price lists

Answer Area

Create Order

- First
- Second
- Third
- Fourth

Component

- Discount list
- Unit groups
- Product family
- Price lists

Explanation:

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

QUESTION 169

Drag and Drop Question

A company uses Dynamics 365 Sales to manage sales orders.

You need to create an order for a new customer.

In which order should you perform the actions? To answer, move all actions from the list of actions to the answer area and arrange them in the correct order.

Actions		Answer Area
Pick items and ship order		
Create a new order for the customer		
Add customer address and shipping information	➤	⬆
Create a new customer account in Dynamics 365 for Sales	⬅	⬇
Add products from inventory for the sale		

Answer:

Actions		Answer Area
		Create a new customer account in Dynamics 365 for Sales
		Create a new order for the customer
	➤	Add products from inventory for the sale
	⬅	Add customer address and shipping information
		Pick items and ship order

Explanation:

<https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/create-edit-order-sales#create-an-order>

QUESTION 170

Hotspot Question

You are a Dynamics 365 Sales system customizer.

You need to create Product Bundles and Product Families.

What should you create? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Answer Area

Requirement	Option
View individual products in a grouping when you create an opportunity.	<div style="border: 1px solid gray; padding: 2px;"> <div style="background-color: #cccccc; height: 20px; display: flex; justify-content: flex-end; align-items: center; padding-right: 5px;">▼</div> <div style="border-top: 1px solid black; padding-top: 2px;">Product Family</div> <div style="border-top: 1px solid black; padding-top: 2px;">Product Bundle</div> </div>
Sell products from a grouping individually.	<div style="border: 1px solid gray; padding: 2px;"> <div style="background-color: #cccccc; height: 20px; display: flex; justify-content: flex-end; align-items: center; padding-right: 5px;">▼</div> <div style="border-top: 1px solid black; padding-top: 2px;">Product Family</div> <div style="border-top: 1px solid black; padding-top: 2px;">Product Bundle</div> </div>
Create a grouping within a grouping.	<div style="border: 1px solid gray; padding: 2px;"> <div style="background-color: #cccccc; height: 20px; display: flex; justify-content: flex-end; align-items: center; padding-right: 5px;">▼</div> <div style="border-top: 1px solid black; padding-top: 2px;">Product Family</div> <div style="border-top: 1px solid black; padding-top: 2px;">Product Bundle</div> </div>

Answer:

Answer Area

Requirement	Option
View individual products in a grouping when you create an opportunity.	<div style="border: 1px solid gray; padding: 2px;"> <div style="background-color: #cccccc; height: 20px; display: flex; justify-content: flex-end; align-items: center; padding-right: 5px;">▼</div> <div style="border-top: 1px solid black; padding-top: 2px; background-color: #d9ead3;">Product Family</div> <div style="border-top: 1px solid black; padding-top: 2px;">Product Bundle</div> </div>
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Create a grouping within a grouping.	<div style="border: 1px solid gray; padding: 2px;"> <div style="background-color: #cccccc; height: 20px; display: flex; justify-content: flex-end; align-items: center; padding-right: 5px;">▼</div> <div style="border-top: 1px solid black; padding-top: 2px; background-color: #d9ead3;">Product Family</div> <div style="border-top: 1px solid black; padding-top: 2px;">Product Bundle</div> </div>

Explanation:

<https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/create-product-bundles-sell-multiple-items-together>