➢ **Vendor:** Microsoft

➢ **Exam Code:** MB-210

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

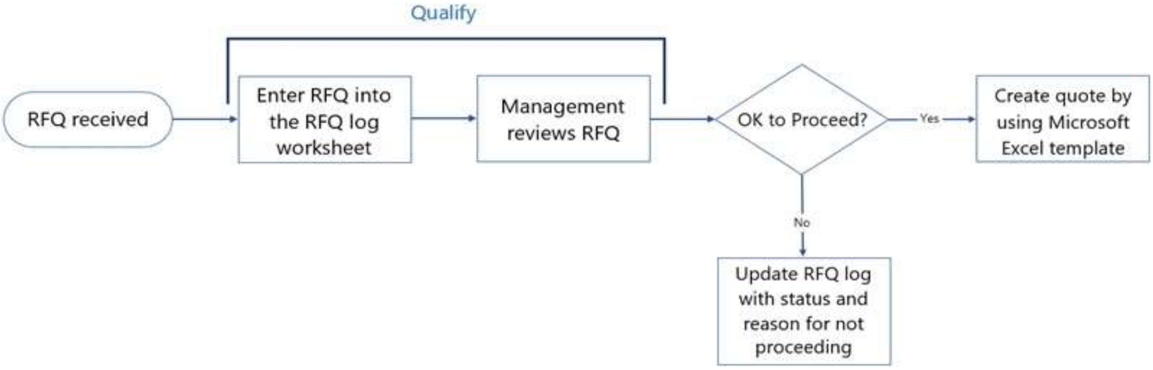
➢ **New Updated Questions from Braindump2go (Updated in August/2021)**

QUESTION 243
Case Study 4 - Contoso, Ltd
Background
Contoso, Ltd. manufactures electronic components for robotic assembly machines. The company specializes in wiring harnesses that are made to customer specifications.
The company's corporate office and a manufacturing plant are in Detroit. The company also has offices and manufacturing plants in the following countries:
- China
- Germany
- Mexico
- United Kingdom (UK)

Current environment
Sales
- Customers who have operations in more than one country are managed by the sales team within the country from which a request originated. However, it is difficult to get information about sales for these customers.
- Each salesperson manually creates customer quotes using Microsoft Word and Excel templates. This causes pricing inconsistencies, which is affecting profitability.
- Customers who have total sales over $1,5M per year receive special Preferred Customer discount pricing on products and services.
- Costs, pricing, and product availability vary greatly by country.

Sales teams
- Each office has a dedicated sales team. Sales are managed by a global team in countries without a sales office.
- Each sales team has a projected revenue target that is tied to the factory capacity in their country, except for the global team. The global team's projected revenue target is derived using a percentage of their actual sales from the previous year.
- Each sales team maintains a spreadsheet in which they record customer requests for quotes (RFQs). The spreadsheets are stored on a network drive.
- Sales team revenue targets are set yearly based on manufacturing capacities at each plant.
- Individual sales targets are based on product lines by quarter.

Current RFQ process
The company defines the following process for processing RFQs:



Requirements

General setup

- Standard functionality must be used when possible.
- All open RFQs must be imported into the solution.
- All information must be accessible to the entire executive management team.
- Country-specific sales information must be accessible only to sales representatives assigned to those teams.
- Sales and quote processes must be standardized across all sales divisions.
- Sales territories must be set up for each country as well as for a global territory.
- The global team will take over the management of RFQs for customers who have operations in more than one region.
- Due to regulatory considerations, the solution must be able to limit the kinds of products that can be sold by region.

RFQ management

- New RFQs must be entered initially into the system as Leads until they are reviewed.
- The default forecast categories must be used.
- Standardized quote formats and product pricing must be enforced across all sales offices.
- All tasks and follow-up activities with customers to close RFQs must be associated directly with the RFQs.

Credit and reference checks

- All new customers must undergo credit and reference checks before estimates are created for any RFQs. This information will be recorded in a new custom field called Credit Check that has a Yes/No value.
- The finance manager must be assigned the credit and reference review when an RFQ is ready for review.
- If a customer's credit and reference review is unfavorable, the finance manager must follow up with the customer and the sales representative by phone.
- The customer's credit report must be added to the RFQ as a permanent record and for audit purposes.
- The solution must provide both a sample script that the finance manager can use as well as a checklist of how to perform the check.

Reporting

The sales manager dashboard must show the following data:

- Projected revenue and profitability per country by month and fiscal year.
- Projected and current product sales per country by month and fiscal year.
- RFQ Won/Loss revenue comparison by fiscal quarter.
- RFQ status by sales representative within their territory.
- RFQs that are awaiting management approval and how long they have been waiting.
- Sales lost to competitors month over month.

Managers must also be able to track how long an RFQ has been awaiting credit and reference checks, and how many RFQs have had unfavorable results from credit or reference checks.

Issues

- PreferredCustomerA, who has factories in Germany, the UK, and Canada, reports that their sales representatives give different pricing and discounts to customers depending on the country in which the RFQ is initiated.
- Several RFQs that have passed management review but failed standard credit checks have been issued quotes. To prevent this, credit checks must now be done before the management approval meeting.
- Several imported RFQs contain quotes for discontinued products. Updated quotes with current product offers need to be sent to customers.
- CompanyB needs pricing for harnesses for their plants in Germany, the UK, and Argentina.

- CompanyC received a quote for harnesses for their US home office. They need the products for their Canadian plant.
- CompanyD wants sales orders and shipments sent directly to VendorZ, who manufactures several subassemblies for them. VendorZ also builds components for other customers as well as for Contoso, Ltd.
- The chief financial officer (CFO) is concerned about the amount of work that the new credit and reference checks will create. Therefore, a time-study needs to be initiated for that work to see whether an additional person needs to be hired.

Hotspot Question
You need to implement sales lost to competitors.
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 the type of loss.	Modify the Status Reason option set. Modify the Forecast category option set. Modify the Close Opportunity option set. Modify the Opportunity Status option set.
Record the loss for forecasting.	Modify the Opportunity Forecast Category Mapping Process workflow. Modify the Opportunity Sales Process business process flow. Modify the Opportunity Close form.

Answer:

Answer Area

Requirement	Action
Add the type of loss.	Modify the Status Reason option set. Modify the Forecast category option set. Modify the Close Opportunity option set. Modify the Opportunity Status option set.
Record the loss for forecasting.	Modify the Opportunity Forecast Category Mapping Process workflow. Modify the Opportunity Sales Process business process flow. Modify the Opportunity Close form.

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

QUESTION 244
Case Study 4 - Contoso, Ltd
Background
Contoso, Ltd. manufactures electronic components for robotic assembly machines. The company specializes in wiring harnesses that are made to customer specifications.
The company's corporate office and a manufacturing plant are in Detroit. The company also has offices and manufacturing plants in the following countries:
- China
- Germany
- Mexico
- United Kingdom (UK)

Current environment
Sales
- Customers who have operations in more than one country are managed by the sales team within the country from which a request originated. However, it is difficult to get information about sales for these customers.
- Each salesperson manually creates customer quotes using Microsoft Word and Excel templates. This causes pricing inconsistencies, which is affecting profitability.
- Customers who have total sales over $1,5M per year receive special Preferred Customer discount pricing on products and services.

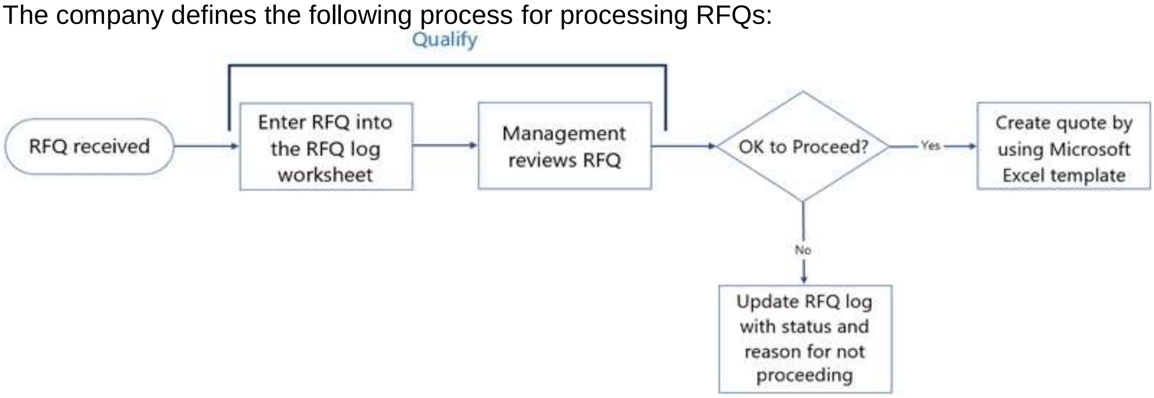
- Costs, pricing, and product availability vary greatly by country.

Sales teams

- Each office has a dedicated sales team. Sales are managed by a global team in countries without a sales office.
- Each sales team has a projected revenue target that is tied to the factory capacity in their country, except for the global team. The global team's projected revenue target is derived using a percentage of their actual sales from the previous year.
- Each sales team maintains a spreadsheet in which they record customer requests for quotes (RFQs). The spreadsheets are stored on a network drive.
- Sales team revenue targets are set yearly based on manufacturing capacities at each plant.
- Individual sales targets are based on product lines by quarter.

Current RFQ process

The company defines the following process for processing RFQs:



Requirements

General setup

- Standard functionality must be used when possible.
- All open RFQs must be imported into the solution.
- All information must be accessible to the entire executive management team.
- Country-specific sales information must be accessible only to sales representatives assigned to those teams.
- Sales and quote processes must be standardized across all sales divisions.
- Sales territories must be set up for each country as well as for a global territory.
- The global team will take over the management of RFQs for customers who have operations in more than one region.
- Due to regulatory considerations, the solution must be able to limit the kinds of products that can be sold by region.

RFQ management

- New RFQs must be entered initially into the system as Leads until they are reviewed.
- The default forecast categories must be used.
- Standardized quote formats and product pricing must be enforced across all sales offices.
- All tasks and follow-up activities with customers to close RFQs must be associated directly with the RFQs.

Credit and reference checks

- All new customers must undergo credit and reference checks before estimates are created for any RFQs. This information will be recorded in a new custom field called Credit Check that has a Yes/No value.
- The finance manager must be assigned the credit and reference review when an RFQ is ready for review.
- If a customer's credit and reference review is unfavorable, the finance manager must follow up with the customer and the sales representative by phone.
- The customer's credit report must be added to the RFQ as a permanent record and for audit purposes.
- The solution must provide both a sample script that the finance manager can use as well as a checklist of how to perform the check.

Reporting

The sales manager dashboard must show the following data:

- Projected revenue and profitability per country by month and fiscal year.
- Projected and current product sales per country by month and fiscal year.
- RFQ Won/Loss revenue comparison by fiscal quarter.
- RFQ status by sales representative within their territory.

- RFQs that are awaiting management approval and how long they have been waiting.
- Sales lost to competitors month over month.

Managers must also be able to track how long an RFQ has been awaiting credit and reference checks, and how many RFQs have had unfavorable results from credit or reference checks.

Issues

- PreferredCustomerA, who has factories in Germany, the UK, and Canada, reports that their sales representatives give different pricing and discounts to customers depending on the country in which the RFQ is initiated.
- Several RFQs that have passed management review but failed standard credit checks have been issued quotes. To prevent this, credit checks must now be done before the management approval meeting.
- Several imported RFQs contain quotes for discontinued products. Updated quotes with current product offers need to be sent to customers.
- CompanyB needs pricing for harnesses for their plants in Germany, the UK, and Argentina.
- CompanyC received a quote for harnesses for their US home office. They need the products for their Canadian plant.
- CompanyD wants sales orders and shipments sent directly to VendorZ, who manufactures several subassemblies for them. VendorZ also builds components for other customers as well as for Contoso, Ltd.
- The chief financial officer (CFO) is concerned about the amount of work that the new credit and reference checks will create. Therefore, a time-study needs to be initiated for that work to see whether an additional person needs to be hired.

Hotspot Question

You need to manage existing RFQs.

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
Provide CompanyB with pricing.	Create a quote for each country. Create a quote for each opportunity. Create a quote for each product bundle.
Update the quotes with discontinued products.	Revise the quote and activate it. Revise the product catalog and activate the quote. Convert the quote to an order.
Update the quote for CompanyC.	Create a new quote. Revise the quote and change the currency to CAD. Convert the quote to an order.

Answer:

Answer Area

Requirement	Action
Provide CompanyB with pricing.	Create a quote for each country. Create a quote for each opportunity. Create a quote for each product bundle.
Update the quotes with discontinued products.	Revise the quote and activate it. Revise the product catalog and activate the quote. Convert the quote to an order.
Update the quote for CompanyC.	Create a new quote. Revise the quote and change the currency to CAD. Convert the quote to an order.

Explanation:

https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/ts-currency-pricelist

QUESTION 245
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Background
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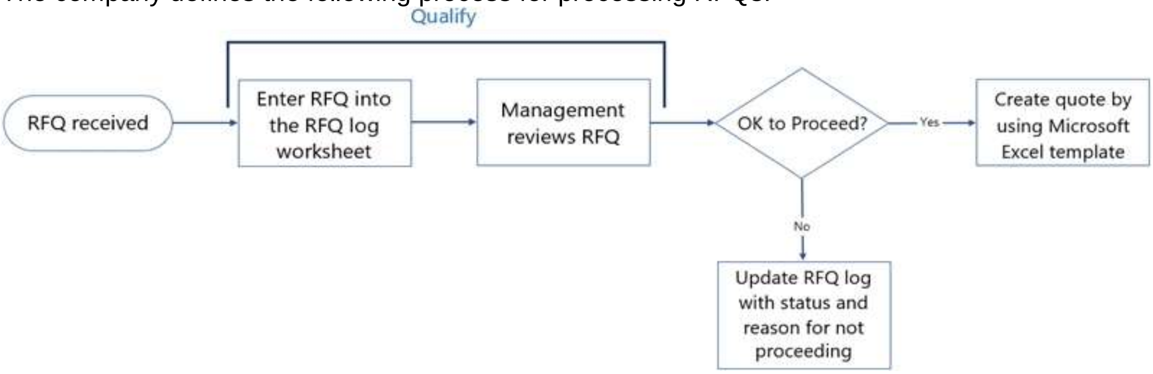

Requirements
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- Sales territories must be set up for each country as well as for a global territory.
- The global team will take over the management of RFQs for customers who have operations in more than one region.
- Due to regulatory considerations, the solution must be able to limit the kinds of products that can be sold by region.

RFQ management
- New RFQs must be entered initially into the system as Leads until they are reviewed.

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- If a customer's credit and reference review is unfavorable, the finance manager must follow up with the customer and the sales representative by phone.
- The customer's credit report must be added to the RFQ as a permanent record and for audit purposes.
- The solution must provide both a sample script that the finance manager can use as well as a checklist of how to perform the check.

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- The chief financial officer (CFO) is concerned about the amount of work that the new credit and reference checks will create. Therefore, a time-study needs to be initiated for that work to see whether an additional person needs to be hired.

Hotspot Question
You need to configure the credit and reference screening playbook 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	Configuration
Ensure that the finance manager performs the credit screening.	Add a Task activity to the playbook. Add the credit screening to the playbook. Add the finance manager as the publisher of the playbook. Add a custom activity for Perform Credit Check and add it to the playbook.
Ensure that the finance manager has the latest version of the unfavorable screening phone script.	Add the script to the phone call activity. Add a phone script to the playbook template. Add the phone script to the Task activity.
Ensure that playbooks can be initiated from all RFQs.	Associate the playbook with the Lead entity only. Associate the playbook with the Opportunity entity only. Associate the playbook with the Lead and Opportunity entities. Associate the playbook with the Quote entity.
Ensure proper tracking for all tasks associated with playbooks.	Set Track Progress to No. Set Track Progress to Yes. Set the estimated duration of the playbook template. Set the estimated duration of the activity.

Answer:

Answer Area

Requirement	Configuration
Ensure that the finance manager performs the credit screening.	Add a Task activity to the playbook. Add the credit screening to the playbook. Add the finance manager as the publisher of the playbook. Add a custom activity for Perform Credit Check and add it to the playbook.
Ensure that the finance manager has the latest version of the unfavorable screening phone script.	Add the script to the phone call activity. Add a phone script to the playbook template. Add the phone script to the Task activity.
Ensure that playbooks can be initiated from all RFQs.	Associate the playbook with the Lead entity only. Associate the playbook with the Opportunity entity only. Associate the playbook with the Lead and Opportunity entities. Associate the playbook with the Quote entity.
Ensure proper tracking for all tasks associated with playbooks.	Set Track Progress to No. Set Track Progress to Yes. Set the estimated duration of the playbook template. Set the estimated duration of the activity.

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

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.

Features
- Unit group
- Discount list
- Product family
- Product bundle

Answer Area

Requirement	Feature
Receive free chips with a soda purchase.	Feature
Purchase a case of soda.	Feature
Purchase 10 cases of soda.	Feature

Answer:

Features
- Product family

Answer Area

Requirement	Feature
Receive free chips with a soda purchase.	Product bundle
Purchase a case of soda.	Unit group
Purchase 10 cases of soda.	Discount list

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	Answer Area
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:

Actions	Answer Area
Add existing products from Get Products.	Revise the quote.
	Add existing products from the products subgrid.
	Activate the quote.
Close the quote as Cancelled.	

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