



MB-210^{Q&As}

Microsoft Dynamics 365 Sales

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QUESTION 1

You are a Dynamics 365 administrator for a company. The company's fiscal year is April 1 through March 31.

You need to create a system view for all users that displays data for the current fiscal year by default.

What should you do?

- A. Set up fiscal year settings and create a view in the default solution
- B. Use date ranges to create a view in the default solution
- C. Set up fiscal year settings and create a view from the advanced find
- D. Use date ranges to create a view from the advanced find

Correct Answer: A

QUESTION 2

A company uses Dynamics 365 Sales.

The sales manager wants leads to automatically route to the salesperson who has the fewest leads.

You need to automate the process.

What should you set up?

- A. assignment rule
- B. assistant
- C. sequence
- D. playbook
- E. business process flow

Correct Answer: A

QUESTION 3

HOTSPOT

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.

Hot Area:

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.

Correct Answer:



Answer Area

Requirement

Action

Follow-up contact

Sales Manager checklist

QUESTION 4

A company uses Dynamics 365 Sales.

A user cannot find the option to view activities in the Kanban view or rearrange the activities.

You need to make the Kanban view available to the user.

What should you do?

- A. Add the user to the correct security role.
- B. Create a new system view.
- C. Add the control to the Activity table.
- D. Instruct the user to create a personal view.

Correct Answer: C

<https://learn.microsoft.com/en-us/dynamics365/sales/activity-kanban-view#open-a-kanban-view>



QUESTION 5

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

Correct Answer: D

Reference: <https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/create-price-lists-price-list-items-define-pricing-products>

QUESTION 6

HOTSPOT

You implement the Dynamics 365 App for Outlook.

You need to associate emails to lead records.

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

NOTE: Each correct selection is worth one point.

Hot Area:

Answer Area

Type	Action
Existing email	<div style="border: 1px solid gray; padding: 2px;"><div style="background-color: #f0f0f0; padding: 2px; margin-bottom: 2px;">Track the email from Advanced Find</div><div style="padding: 2px;">Set the regarding field on the email from Dynamics 365 App for Outlook</div></div>
New email	<div style="border: 1px solid gray; padding: 2px;"><div style="background-color: #f0f0f0; padding: 2px; margin-bottom: 2px;">Add an email from Lead Timeline</div><div style="padding: 2px;">Insert a Lead email template</div></div>

Correct Answer:



Answer Area

Type	Action
Existing email	<div style="border: 1px solid gray; padding: 2px;"><div style="background-color: #f0f0f0; padding: 2px;">▼</div><div style="padding: 2px;">Track the email from Advanced Find</div><div style="background-color: #e0f0e0; padding: 2px;">Set the regarding field on the email from Dynamics 365 App for Outlook</div></div>
New email	<div style="border: 1px solid gray; padding: 2px;"><div style="background-color: #f0f0f0; padding: 2px;">▼</div><div style="padding: 2px;">Add an email from Lead Timeline</div><div style="background-color: #e0f0e0; padding: 2px;">Insert a Lead email template</div></div>

QUESTION 7

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 Manager
- B. Knowledge Manager
- C. System Customizer
- D. Common Data Service

Correct Answer: A

QUESTION 8

HOTSPOT

You need to create a discount list for ticket sales.

Which pricing methods should you use? To answer, select the appropriate method in the dialog box in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:



Alumni

Percent Markup – Current Cost
Percent Margin – Current Cost
Percent Margin – Standard Cost

Non-alumni

Percent Markup – Current Cost
Percent Margin – Current Cost
Percent Margin – Standard Cost

Correct Answer:



Alumni

	▼
Percent Markup – Current Cost	
Percent Margin – Current Cost	
Percent Margin – Standard Cost	

Non-alumni

	▼
Percent Markup – Current Cost	
Percent Margin – Current Cost	
Percent Margin – Standard Cost	

QUESTION 9

HOTSPOT

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.

Hot Area:



Answer Area

Element	Value
Type	<input type="text"/> Interactive Experience Dashboard Dashboard
Stream	<input type="text"/> Single stream Multi stream
Creation location	<input type="text"/> Home page Entity

Correct Answer:

Answer Area

Element	Value
Type	<input type="text"/> Interactive Experience Dashboard Dashboard
Stream	<input type="text"/> Single stream Multi stream
Creation location	<input type="text"/> Home page Entity

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

QUESTION 10



An organization uses Dynamics 365 for Sales.

You need to create a quote template in Microsoft Word for use in the organization.

What should you do?

- A. Create a flow
- B. Enable dynamic content in Microsoft Word
- C. Enable the Developer tab in Microsoft Word
- D. Enable VBA in Microsoft Word

Correct Answer: C

Reference: <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/admin/using-word-templates-dynamics-365>

QUESTION 11

You manage a Dynamics 365 Sales environment.

You need to ensure that all possible activities are automatically converted to leads by using the record creation rule.

Which three activities can you convert to leads? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

- A. Service activity
- B. Email
- C. Phone call
- D. Task
- E. Custom activity

Correct Answer: ABE

QUESTION 12

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, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.



A company plans to move their headquarters from the United States to Europe.

You need to round all currency values to four decimal places and display the correct currency symbol.

Solution: Change the currency decimal precision and currency display options.

Does the solution meet the goal?

A. Yes

B. No

Correct Answer: A

QUESTION 13

HOTSPOT

You need to create visualizations for managers.

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

NOTE: Each correct selection is worth one point.

Hot Area:

All leads by requirement in the last 30 days

	▼
Dashboard	
Views	
Graphs	

Leads converted in the last 30 days

	▼
Graph	
Report	
Export to Microsoft Excel	

Correct Answer:



All leads by requirement in the last 30 days

Dashboard
Views
Graphs

Leads converted in the last 30 days

Graph
Report
Export to Microsoft Excel

QUESTION 14

You modify the default form for salespeople in Dynamics 365 Sales. A US Citizen column has a type option of Yes or No.

The salespeople require a country/region column to appear only if the US Citizen column is set to No.

You need to enable the column to appear when the condition is met.

What should you configure?

- A. business process flow
- B. column with type as Choices
- C. column with type as Calculated
- D. business rule

Correct Answer: D

QUESTION 15

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, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.

You are a Dynamics 365 for Sales system customizer.

You need to set up LinkedIn Sales Navigator Lead (member profile) on the Lead form.

Solution: Add the LinkedIn Sales Navigator Contact (member profile) control.

Does the solution meet the goal?

A. Yes

B. No

Correct Answer: B

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