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Microsoft Dynamics 365 for Sales

Sections

1. Perform Configuration
2. Manage Core Sales Identities
3. Manage Sales Entities

Exam A

QUESTION 1

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.



<https://vceplus.com/> Does the

solution meet the goal?

- A. Yes
- B. No

Correct Answer: A

Section: Perform Configuration

Explanation

Explanation/Reference:

QUESTION 2

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 code and symbol so that both are displayed.

Does the solution meet the goal?

- A. Yes
- B. No

Correct Answer: B

Section: Perform Configuration

Explanation

Explanation/Reference:



QUESTION 3

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 default currency.

Does the solution meet the goal?

- A. Yes
- B. No

Correct Answer: B

Section: Perform Configuration

Explanation

Explanation/Reference:

QUESTION 4

You work for a company using Dynamics 365 for Sales.

When customers call the company, they must provide their quote number. Customers report that quote numbers are too long.

You need to shorten quote numbers to the minimum possible length.

What should you do?

- A. Change the field type from auto number to decimal number
- B. Reduce the auto number prefix to one character
- C. Reduce the suffix length to four characters
- D. Ensure that the prefix setting is read-only



Correct Answer: B

Section: Perform Configuration

Explanation

Explanation/Reference:

References: <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/admin/change-auto-number-prefix-contract-case-article-quote-order-invoice-campaigncategory-knowledge-articles>

QUESTION 5

You are a Dynamics 365 administrator.

A sales manager changes the target goal for a salesperson from \$26,000.00 to \$20,000.00. However, the currency symbol changes from \$ to £. Other managers are not experiencing this issue.

You need to fix the currency symbol for the sales manager.

What should you change?

- A. the default currency in personal options

- B. the currencies in settings
- C. the currency display option in system settings
- D. the current format in personal options

Correct Answer: A

Section: Perform Configuration

Explanation

Explanation/Reference:

QUESTION 6

You are Dynamics 365 for Sales administrator.

Sales representatives must enter estimated revenue only as an exception.

You need to ensure that estimated revenue for opportunities is automatically calculated.

What should you do?

- A. In the System Settings sales tab, change the default revenue type to **System Calculated**
- B. In custom controls, change the default revenue setting to **System Calculated**
- C. In Personalization settings for each user, change the default revenue type to **System Calculated**
- D. In Opportunities, change the default value of the revenue type to **System Calculated**

Correct Answer: D

Section: Perform Configuration

Explanation

Explanation/Reference:

QUESTION 7

You manage a default Dynamics 365 for Sales environment. You are configuring a sales dashboard.

You need to create an interactive dashboard.

Which three entities can you use? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

- A. Queue Item
- B. Opportunity
- C. Knowledge Article
- D. Case
- E. Invoice

Correct Answer: ACD

Section: Perform Configuration

Explanation

Explanation/Reference:

References: <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/customize/configure-interactive-dashboards>

QUESTION 8

You have opportunities that have values in multiple currencies. The currency exchange rate automatically updates.

You need to ensure that currency values are accurately reported.

When is the new currency exchange rate applied to the opportunity records?

- A. when a change is made to a currency field
- B. when a user opens the opportunity record
- C. when a user manually recalculates opportunity
- D. when the calculate rollup field system job for the msdyn_projectteam entity runs

Correct Answer: A

Section: Perform Configuration

Explanation

Explanation/Reference:

QUESTION 9

DRAG DROP


You are a Dynamics 365 for Sales administrator.

You need to implement Versium Predict with custom views.

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.

Select and Place:

Actions	Answer Area
Add custom views using Versium Predict solution	
Authenticate Versium Predict	
Install Versium Predict from the Dynamics 365 Administration Center	
Install Versium Predict from Microsoft AppSource	
Add custom views using web resources	



Correct Answer:

Actions	Answer Area
Add custom views using Versium Predict solution	
Install Versium Predict from the Dynamics 365 Administration Center	

Install Versium Predict from Microsoft AppSource	
Authenticate Versium Predict	
Add custom views using web resources	



Section: Perform Configuration**Explanation****Explanation/Reference:**

Explanation:

QUESTION 10

A company plans to close early on the last day of the month for an employee celebration.

You need to configure Dynamics 365 to prevent scheduling of sales support resources for that day.

Which feature should you use?

- A. Events
- B. Business closure
- C. Fiscal calendar
- D. Time off request

Correct Answer: B

Section: Perform Configuration**Explanation****Explanation/Reference:**

References: <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/customer-service/set-when-business-closed-csh>

QUESTION 11

An organization uses sales dashboards in Dynamics 365.

You need to configure a single dashboard that includes the following data:

- both complex key performance indicators that are derived from external data and custom visuals
- real-time data on sales performance that is based on Dynamics 365 data.

Which three actions should you perform? Each correct answer presents part of the solution.

NOTE: Each correct selection is worth one point.

- A. Add the external data as virtual entities in Dynamics 365 and use it for the dashboard visualizations.

- B. Create all visuals in a Microsoft Power BI dashboard. Embed the dashboard in Dynamics 365.
- C. Create tiles and a dashboard in Microsoft Power BI.
- D. Create charts with required data in Dynamics 365.
- E. Combine Microsoft Power BI and standard charts on a standard dashboard in Dynamics 365.

Correct Answer: ABE

Section: Perform Configuration

Explanation

Explanation/Reference:

QUESTION 12

You are an administrator for Dynamics 365 for Sales.

You need to ensure that a user can install and configure the Social Selling Assistant.

Which two actions should you perform? Each correct answer presents part of the solution.



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NOTE: Each correct selection is worth one point.

- A. Grant the user the sales manager role
- B. Assign the user a license for Microsoft Dynamics 365 (online) or Microsoft Social Engagement
- C. Assign the user a license for both Microsoft Dynamics 365 (online) and Microsoft Social Engagement
- D. Grant the user the system administrator or system customizer role

Correct Answer: CD

Section: Perform Configuration**Explanation**

Explanation/Reference: References: [https://docs.microsoft.com/en-us/previous-versions/dynamicscrm-2016/administering-dynamics-365/mt793319\(v=crm.8\)](https://docs.microsoft.com/en-us/previous-versions/dynamicscrm-2016/administering-dynamics-365/mt793319(v=crm.8))

QUESTION 13

A company uses Dynamics 365 for Sales. The company has not made changes to any of the default security roles.

You need to ensure that users can assign salespeople to sales territories.

Which security role can you use?

- A. Delegate
- B. Sales Person
- C. Sales Manager
- D. System Customizer

Correct Answer: C

Section: Perform Configuration**Explanation**

Explanation/Reference:

**QUESTION 14**

A company uses Dynamics 365 for Sales to analyze their competitive wins and losses data.

Sales staff close lost opportunities and enter the Actual Revenue, Closed Date, Competitor, and the reason for the loss.

You need to create a dashboard that provides information related to the last 30 days of opportunities closed as lost.

Which entity should you use?

- A. Opportunity Close
- B. Opportunity
- C. Competitor
- D. Opportunity Line

Correct Answer: B

Section: Perform Configuration

Explanation

Explanation/Reference:

QUESTION 15

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

Section: Perform Configuration

Explanation



Explanation/Reference:

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

QUESTION 16

You manage a Dynamics 365 environment. A user named User1 begins work on an opportunity.

User1 asks a user named User2 to assist with the opportunity while she is on vacation.

You need to ensure that User2 can access the opportunity and that User1 retains ownership of the opportunity.

What should you do?

- A. Share the record with User2
- B. Grant User2 the stakeholder role
- C. Grant User2 the security role

D. Instruct User2 to follow the record

Correct Answer: A

Section: Manage Core Sales Identities

Explanation

Explanation/Reference:

References: <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/developer/security-dev/use-record-based-security-control-access-records#sharing-records>

QUESTION 17

You manage Dynamics 365 environments for client organizations.

A client suspects they are losing business. The client must be able to capture reasons each time an opportunity is lost.

You need to configure Dynamics 365 to ensure that you can capture the required information.

Which field should you configure?

- A. Opportunity status reason
- B. Opportunity close status
- C. Opportunity status
- D. Opportunity close status reason



Correct Answer: A

Section: Manage Core Sales Identities

Explanation

Explanation/Reference:

QUESTION 18

You use price lists in Dynamics 365 for Sales. Some price lists have expired.

Users need to be able to continue to manage their opportunities.

Which option is possible?

- A. Users can add the expired price list to opportunities created prior to the expire date.

- B. Users can add the expired price list to an opportunity but will see a warning.
- C. Opportunities that use the expired price list can continue through their lifecycle.
- D. Opportunities that use the expired price list will display a warning that prices must be replaced.

Correct Answer: D

Section: Manage Core Sales Identities

Explanation

Explanation/Reference:

QUESTION 19

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

You need to create a process that meets the following requirements:

- Create an order from a quote.
- Close the associated opportunity as won.
- Update the actual values to reflect values from the quote.

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

NOTE: Each correct selection is worth one point.

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

Correct Answer: AB

Section: Manage Core Sales Identities

Explanation

Explanation/Reference:

QUESTION 20

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 customer recently visited one of your retail outlets. You created an opportunity for the customer for a large purchase.

The customer is now ready to complete the purchase.

You need to create a quote from the opportunity.

Solution: Close the opportunity as won.

Does the solution meet the goal?

A. Yes

B. No

Correct Answer: B

Section: Manage Sales Entities

Explanation

Explanation/Reference:

References: <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/developer/convert-opportunity-quote-sales-order-invoice>

QUESTION 21

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 customer recently visited one of your retail outlets. You created an opportunity for the customer for a large purchase.

The customer is now ready to complete the purchase.

You need to create a quote from the opportunity.

Solution: Convert the Opportunity to a quote.

Does the solution meet the goal?

A. Yes

B. No

Correct Answer: A

Section: Manage Sales Entities

Explanation

Explanation/Reference:

References: <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/developer/convert-opportunity-quote-sales-order-invoice>

QUESTION 22

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 customer recently visited one of your retail outlets. You created an opportunity for the customer for a large purchase.

The customer is now ready to complete the purchase.

You need to create a quote from the opportunity.

Solution: Qualify the opportunity.

Does the solution meet the goal?

A. Yes

B. No

Correct Answer: B

Section: Manage Sales Entities

Explanation

Explanation/Reference:

References: <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/developer/convert-opportunity-quote-sales-order-invoice>

QUESTION 23

You work in a sales role for an organization that uses Dynamics 365. You are managing an opportunity for a potential customer.

You need to create a quote that automatically includes all the products from the opportunity.



What should you do?

- A. Convert the opportunity to a quote
- B. Create a new quote from the customer
- C. Create a new quote from the opportunity
- D. Create a new quote with the opportunity price list

Correct Answer: A

Section: Manage Sales Entities

Explanation

Explanation/Reference:

References:

<https://docs.microsoft.com/en-us/dynamics365/customer-engagement/developer/convert-opportunity-quote-sales-order-invoice>

QUESTION 24

You are a salesperson using Dynamics 365 for Sales.

You need to revise an active quote.

What happens to the original quote record?

- A. The quote is deleted
- B. The quote is converted into an order and a copy of the quote is put in draft mode for modification
- C. The original quote is put in draft mode for modification
- D. The quote is closed, and a copy of the quote is put in draft mode for modification

Correct Answer: C

Section: Manage Sales Entities

Explanation

Explanation/Reference:

QUESTION 25

You create an invoice with products and services for a customer.

You need to add pricing for a product that is not available in the product catalog.

What should you do?

- A. Add the product to the order and use Get Products
- B. Add a write-in product
- C. Add an existing product and change the name and price
- D. Add the product to the quote and use Get Products

Correct Answer: B

Section: Manage Sales Entities

Explanation

Explanation/Reference:

References:

<https://docs.microsoft.com/en-us/dynamics365/customer-engagement/sales-enterprise/add-product-quote-order-invoice> **QUESTION 26**

You are a Dynamics 365 for Sales administrator.

The sales team is having difficulty locating related products.

You need to make it easier for the sales team to find groups of products that are similar.

What should you use?

- A. Related products
- B. Product bundles
- C. Product families
- D. Product unit groups

Correct Answer: A

Section: Manage Sales Entities

Explanation

Explanation/Reference: References: <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/sales-enterprise/define-related-products-increase-chances-sales>

QUESTION 27

A company uses Dynamics 365 for Sales.

You create a new quote and associate an opportunity to the quote.

You need to display all your items from the opportunity in the quote.

What should you do?

- A. Activate the quote
- B. Select **Get Products** from the command bar in the Quote entity
- C. Select **Add Line** Items on the Opportunity entity
- D. Select **Recalculate** from the command bar on the Opportunity entity

Correct Answer: B

Section: Manage Sales Entities

Explanation

Explanation/Reference:



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