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NEW QUESTION: 1

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

Answer: A,C,D ([LEAVE A REPLY](#))

Reference:

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

NEW QUESTION: 2

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.

Step	Configuration
Configure a relationship definition.	<ul style="list-style-type: none"> account opportunity contact product
Select the top of the hierarchy.	<ul style="list-style-type: none"> customer name main event record parent opportunity field opportunity entity

Answer:

Step	Configuration
Configure a relationship definition.	<ul style="list-style-type: none"> account opportunity contact product
Select the top of the hierarchy.	<ul style="list-style-type: none"> customer name main event record parent opportunity field opportunity entity

Reference:

<https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/configure-forecast-using-custom-rollup-entity>

NEW QUESTION: 3

You are a Dynamics 365 Sales administrator. You create a forecast by using the forecast category layout shown in the exhibit:

Preview		Quota	Manager	Best case	Committed	Lost	Omitted	Pipeline	Won
C	City	—	—	—	—	—	—	—	75%
S	South	—	—	—	—	—	—	—	75%
N	North	—	—	—	—	—	—	—	75%

Use the drop-down menus to select the answer choice that answers each question based on the information presented in the graphic.

NOTE: Each correct selection is worth one point.

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Where should you rename the Omitted column to Cancelled for this forecast?

- Forecast Category option set
- Forecast view
- Layout column settings
- Preview grid

Where should you delete the Lost column for this forecast?

- Forecast configuration
- Forecast configuration filter data
- Forecast Category option set value
- Forecast view

Answer:

Microsoft

Where should you rename the Omitted column to Cancelled for this forecast?

- Forecast Category option set
- Forecast view
- Layout column settings
- Preview grid

Where should you delete the Lost column for this forecast?

- Forecast configuration
- Forecast configuration filter data
- Forecast Category option set value
- Forecast view

Reference:

<https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/choose-layout-and-columns-forecast>

NEW QUESTION: 4

You are creating orders from quotes in Dynamics 365.

In some circumstances, customers no longer require an order. In other circumstances, your company delivers the order.

You need to ensure that closed orders use existing functionality to reflect the circumstances.

Which two methods of closing an order are available out of the box? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

- A. Cancel
- B. Activate
- C. Accept
- D. Fulfill

Answer: A,D (LEAVE A REPLY)

Reference:

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

NEW QUESTION: 5

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

Answer: A (LEAVE A REPLY)

Reference:

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

NEW QUESTION: 6

You are a Dynamics 365 Sales system customizer.

Salespeople report that they cannot search for open and closed opportunities using the search tool in the Quick Find View.

You need to configure the search tool to show the open and closed opportunities in the Customize the System area.

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
Open the Quick Find View.	
Open the Main View.	
Expand the Opportunity entity.	
Delete the filter criteria Status Equals Open.	
Change the filter criteria to Status Does Not Equal Open.	

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Answer:

Answer Area

Expand the Opportunity entity.

Open the quick Find View.

Change the filter criteria to Status Does Not Equal Open.



- 1 - Expand the Opportunity entity.
- 2 - Open the quick Find View.
- 3 - Change the filter criteria to Status Does Not Equal Open.

NEW QUESTION: 7

You are a Dynamics 365 for Sales administrator.

You create the following flow.



Use the drop-down menus to select the answer choice that answers each question based on the information presented in the graphic.

NOTE: Each correct selection is worth one point.

You need to see time spent in the Qualify stage. What should you do?

- Create a SSRS report.
- Create a FetchXML report.
- Add a custom field to store the time.
- Add a data step to store the time.

You need to return to the Develop stage and make a change. What happens to the process flow?

- The Propose stage becomes inactive and the Develop stage becomes active.
- The Propose stage remains active and the Develop stage becomes active.
- The Propose stage remains active and the Develop stage becomes revised.

Answer:

You need to see time spent in the Qualify stage. What should you do?

- Create a SSRS report.
- Create a FetchXML report.
- Add a custom field to store the time.
- Add a data step to store the time.

You need to return to the Develop stage and make a change. What happens to the process flow?

- The Propose stage becomes inactive and the Develop stage becomes active.
- The Propose stage remains active and the Develop stage becomes active.
- The Propose stage remains active and the Develop stage becomes revised.

NEW QUESTION: 8

You manage a Dynamics 365 environment. You plan to implement business process flows from AppSource.

You need to ensure that a user can install the business process flows.

What should you do?

- A. Assign the Dynamics 365 System Customizer role to the user
- B. Assign the Common Data Service User role to the user
- C. In the Power Apps Admin center, assign Environment Maker permissions to the user
- D. In the Office 365 Admin center, assign Application proxy permissions to the user

Answer: A (LEAVE A REPLY)

Reference:

<https://docs.microsoft.com/en-us/dynamics365/customerengagement/on-premises/customize/add-ready-use-business-processes>

NEW QUESTION: 9

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.

Requirement	Action
Create leads from incoming emails	<ul style="list-style-type: none">Create a Queue and Record Creation RuleCreate a Workflow for incoming emailsCreate an Action to trigger a plug-in
Do not create contacts from emails from unknown senders	<ul style="list-style-type: none">Disable Create records for emails from unknown sendersEnable duplicate detection rules for emailsDisable duplicate detection rules for leadsEnable Create Lead in email tracking

Answer:

Requirement	Action
Create leads from incoming emails	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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

Reference:

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

NEW QUESTION: 10

Please wait while the virtual machine loads. Once loaded, you may proceed to the lab section. This may take a few minutes, and the wait time will not be deducted from your overall test time. When the Next button is available, click it to access the lab section. In this section, you will perform a set of tasks in a live environment. While most functionality will be available to you as it would be in a live environment, some functionality (e.g., copy and paste, ability to navigate to external websites) will not be possible by design.

Scoring is based on the outcome of performing the tasks stated in the lab. In other words, it doesn't matter how you accomplish the task, if you successfully perform it, you will earn credit for that task.

Labs are not timed separately, and this exam may have more than one lab that you must complete. You can use as much time as you would like to complete each lab. But, you should manage your time appropriately to ensure that you are able to complete the lab(s) and all other sections of the exam in the time provided.

Please note that once you submit your work by clicking the Next button within a lab, you will NOT be able to return to the lab.

A sales manager requests to view all the closed opportunities by source campaigns. The manager wants the visual formatted as a stacked bar comparison of which closed opportunities are won versus lost.

You need to configure your environment to provide access to the visual. You must name the visual Opportunities Won vs. Lost by Campaign.

To complete this task, sign in to the Dynamics 365 portal.

Answer:

Create a new chart.

Select bar chart.

Name the chart Opportunities Won vs. Lost by Campaign.

Select the Opportunities view to be used by the chart.

Configure the Legend Entries for Opportunities Won and Opportunities Lost by source campaigns.

Click Save & Close.

NEW QUESTION: 11

You need to enter information about VendorZ into the system.

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

NOTE: Each correct selection is worth one point.

- A. Update the contact preference for CompanyD.
- B. Create an account record for VendorZ.
- C. Create a new connection type.
- D. Update the contact preference for VendorZ.
- E. Create a sub-contact record for the vendor for CompanyD.

Answer: ([SHOW ANSWER](#))

NEW QUESTION: 12

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

Answer: ([SHOW ANSWER](#))

NEW QUESTION: 13

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.

Requirement	Tool or service
Provide basic self-service customer support for frequently asked questions.	<ul style="list-style-type: none"> 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.	<ul style="list-style-type: none"> AI Builder Power Virtual Agents Sales Insights
Provide routing of new product inquiries to product sales experts or product team members.	<ul style="list-style-type: none"> AI Builder Power Virtual Agents Sales Insights

Answer:

Requirement	Tool or service
Provide basic self-service customer support for frequently asked questions.	<ul style="list-style-type: none"> 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.	<ul style="list-style-type: none"> AI Builder Power Virtual Agents Sales Insights
Provide routing of new product inquiries to product sales experts or product team members.	<ul style="list-style-type: none"> AI Builder Power Virtual Agents Sales Insights

Reference:

<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>

NEW QUESTION: 14

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: On the Quotes tab of the opportunity, select Add New Quote.

Does the solution meet the goal?

A. Yes

B. No

Answer: (SHOW ANSWER)

Reference:

<https://docs.microsoft.com/en-us/dynamics365/customer-engagement/sales-enterprise/create-edit-quote-sales>

NEW QUESTION: 15

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.

Ticket price	Method
Alumni	<input type="checkbox"/> Percent Markup – Current Cost <input type="checkbox"/> Percent Margin – Current Cost <input type="checkbox"/> Percent Margin – Standard Cost
Non-alumni	<input type="checkbox"/> Percent Markup – Current Cost <input type="checkbox"/> Percent Margin – Current Cost <input type="checkbox"/> Percent Margin – Standard Cost

Answer:

Ticket price	Method
Alumni	<input checked="" type="checkbox"/> Percent Markup – Current Cost <input type="checkbox"/> Percent Margin – Current Cost <input type="checkbox"/> Percent Margin – Standard Cost
Non-alumni	<input checked="" type="checkbox"/> Percent Markup – Current Cost <input type="checkbox"/> Percent Margin – Current Cost <input type="checkbox"/> Percent Margin – standard cost

Topic 3, group of theaters

To start the case study

To display the first question in this case study, click the Next button. Use the buttons in the left pane to explore the content of the case study before you answer the questions. Clicking these buttons displays information such as business requirements, existing environment, and problem statements. If the case study has an All Information tab, note that the information displayed is identical to the information displayed on the subsequent tabs. When you are ready to answer a question, click the Question button to return to the question.

Background

A company owns a group of theaters that stage live performances. Tickets to shows are sold by individual representatives by using a mobile app.

Each theater has a manager. The managers rotate between theaters every six months.

The company plans to implement Dynamics 365 Sales.

Current environment

The company uses the following pricing structure for tickets:

Quantity tickets per show	Pricing per ticket
Fewer than 10	\$50.00
11 or more but fewer than 25	10 percent off ticket price
More than 26	15 percent off ticket price

Representatives create Microsoft Word documents to use as invoices. Pricing for tickets is often inconsistent. Ticket sales are often lost because customers go to other shows.

Requirements

Business cards

- * The business card of every group sales customer must be scanned and the image saved with the contact record.
- * A customer's business card must be scanned even if the customer has been to the theater before.
- * Business cards must show up on all contact forms.

Salespeople

- * Each salesperson needs to sell a certain amount of tickets per month.
- * The number of tickets each salesperson sells must be totaled only at the end of the month, before the monthly meeting between the salesperson and their manager.
- * Salespeople must not be able to check the quantity sold in the system daily.

Opportunities

- * The name of the sales manager must be added to opportunity records when sales representatives close opportunities.
- * Opportunities that are lost must include the reasons other show and not interested.
- * Some of the opportunities who order a large quantity of tickets every week want quotes quickly on various quantities. They want it broken down as follows:

*Price breakout by ticket

*Quantity discount amount

*Original ticket price

Orders

- * Customers who buy a large quantity of tickets to a show must always get a quote first.
- * Orders must always be created from the Quote record when it is a large purchase.
- * Customers who buy a smaller quantity of tickets that do not have quotes must have an invoice sent to them.

Data Analysis

- * Analyze email messages that pertain to ticket sales of the shows.
- * Analyze relationships to help with potential sales of friends and coworkers for potential ticket buyers.
- * Analyze accounts and assess the account representative's relationship with the customer to gauge the level of communication.

Visuals

A Tickets dashboard for all cashiers must be created that contains the following bar Charts:

- * all the tickets sold for each show
- * all the tickets available for each show

- * accounts that have purchased groups of 10 or more tickets

- * purchased tickets by age groups

Shows

- * Representatives must track which shows customers go to when they do not purchase the tickets to their shows. This information must be entered in the records.

- * Every time a potential large sale is lost, the representative needs to ask the customer which show ticket was purchased instead of their show.

- * Shows at other theaters must be updated on a monthly basis.

- * Quantity discounts and bulk purchase for different shows must be consistent.

Issues

- * The Tickets dashboard has eight sections. The dashboard includes a line chart that displays data about age groups. The dashboard also has a chart that group ticket sales. The chart shows 10 or more tickets sold but is missing accounts that purchased more than 20 tickets.

- * Cashiers report that they cannot see two specific area of the Tickets dashboard. Salespeople report that they can see all areas of the dashboard.

- * Representative 1 is unable to scan business cards.

- * Some users do not see the business cards when using their desktop machines, but they see them from their tablets and mobile phones.

- * There are no business card images in the system.

- * Duplicate contacts are being created with business card scans.

NEW QUESTION: 16

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 (LEAVE A REPLY)

Activity tracking is enabled in the Playbook template.

Reference:

<https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/track-playbook-activities>

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NEW QUESTION: 17

A company uses Dynamics 365 Sales.

You need to configure the Sales Insights sales accelerator.

What should you create?

- A. Communication frequency
- B. Insight cards
- C. Leads
- D. Sequences

Answer: D ([LEAVE A REPLY](#))

NEW QUESTION: 18

You need to optimize generated forecasts. What should you create?

- A. two predictive lead scoring models
- B. one predictive opportunity scoring model
- C. two predictive opportunity scoring models
- D. one predictive lead scoring model

Answer: ([SHOW ANSWER](#)**)**

NEW QUESTION: 19

A company uses special pricing for bulk purchases of products.

A sales team member cannot create pricing lists for preferred customers.

You need to set up a discount price list.

What are three possible security roles that can be used? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

- A. Sales Team Member
- B. Vice President of Sales
- C. Sales Manager
- D. CEO-Business Manager
- E. President of Sales

Answer: B,C,D ([LEAVE A REPLY](#))

Reference:

<https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/set-up-discount-list>

NEW QUESTION: 20

You need to configure opportunity status reasons to meet the requirements for existing customer sales.

Which options should you use? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Scenario	Entity	Status reason
An existing customer is not renewing their private box rental.	<input type="text"/> Opportunity Order Phone Call Activity Email Activity	<input type="text"/> Other Non Interested Wrong Number Connected
You need to complete the follow-up for a group sale inquiry following a call from an existing customer.	<input type="text"/> Opportunity Order Phone Call Activity Email Activity	<input type="text"/> Other Non Interested Wrong Number Connected

Answer:

Scenario	Entity	Status reason
An existing customer is not renewing their private box rental.	<input type="text"/> Opportunity Order Phone Call Activity Email Activity	<input type="text"/> Other Non Interested Wrong Number Connected
You need to complete the follow-up for a group sale inquiry following a call from an existing customer.	<input type="text"/> Opportunity Order Phone Call Activity Email Activity	<input type="text"/> Other Non Interested Wrong Number Connected

NEW QUESTION: 21

You need to set up goals for the salespeople.

How should you set up the configurations? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Configuration	Scope
Goal calculation	<div style="border: 1px solid #ccc; padding: 2px;"> <div style="text-align: right;">▼</div> <div style="border-bottom: 1px solid #ccc; padding: 2px;">System</div> <div style="border-bottom: 1px solid #ccc; padding: 2px;">Manual Recalculate as needed</div> <div style="border-bottom: 1px solid #ccc; padding: 2px;">Business entity</div> </div>
Goal type	<div style="border: 1px solid #ccc; padding: 2px;"> <div style="text-align: right;">▼</div> <div style="border-bottom: 1px solid #ccc; padding: 2px;">Child</div> <div style="border-bottom: 1px solid #ccc; padding: 2px;">Parent</div> <div style="border-bottom: 1px solid #ccc; padding: 2px;">Stretch</div> </div>

Answer:

Configuration	Scope
Goal calculation	<div style="border: 1px solid #ccc; padding: 2px;"> <div style="text-align: right;">▼</div> <div style="border-bottom: 1px solid #ccc; padding: 2px; border: 2px solid red;">System</div> <div style="border-bottom: 1px solid #ccc; padding: 2px;">Manual Recalculate as needed</div> <div style="border-bottom: 1px solid #ccc; padding: 2px;">Business entity</div> </div>
Goal type	<div style="border: 1px solid #ccc; padding: 2px;"> <div style="text-align: right;">▼</div> <div style="border-bottom: 1px solid #ccc; padding: 2px; border: 2px solid red;">Child</div> <div style="border-bottom: 1px solid #ccc; padding: 2px;">Parent</div> <div style="border-bottom: 1px solid #ccc; padding: 2px;">Stretch</div> </div>

Reference:

<https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/goals-overview>

NEW 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. 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 ([LEAVE A REPLY](#))

Reference:

<https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/keep-forecast-data-up-to-date>

NEW QUESTION: 23

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: (SHOW ANSWER)

Reference:

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

NEW QUESTION: 24

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

Answer: (SHOW ANSWER)

Reference:

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

NEW QUESTION: 25

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	Answer Area	Scenario	Filter Type
Timeframe filter		View accounts based on case priority	Filter type
Visual filter		View accounts created in the last three months	Filter type
Global filter		View accounts by Created On dates	Filter type

Answer:



NEW QUESTION: 26

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 Line
- C. Opportunity
- D. Competitor

Answer: ([SHOW ANSWER](#))

NEW QUESTION: 27

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.

Requirement

Setting

Hierarchical route

	▼
Owner	
User	
Contact	
Manager	



Microsoft

Permissions - User Lookup field

	▼
User	
Manager	
Created By	
None	

Answer:

Requirement	Setting										
Hierarchical route	<table border="1"><tr><td></td><td>▼</td></tr><tr><td colspan="2">Owner</td></tr><tr><td colspan="2">User</td></tr><tr><td colspan="2">Contact</td></tr><tr><td colspan="2">Manager</td></tr></table>		▼	Owner		User		Contact		Manager	
	▼										
Owner											
User											
Contact											
Manager											
Permissions - User Lookup field	<table border="1"><tr><td></td><td>▼</td></tr><tr><td colspan="2">User</td></tr><tr><td colspan="2">Manager</td></tr><tr><td colspan="2">Created By</td></tr><tr><td colspan="2">None</td></tr></table>		▼	User		Manager		Created By		None	
	▼										
User											
Manager											
Created By											
None											

Reference:

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

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

NEW QUESTION: 28

You need to configure the RFQ Won/Loss chart.

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

NOTE: Each correct selection is worth one point.

Chart requirement	Configuration
Type of chart	<div style="border: 1px solid #ccc; padding: 2px;"> <div style="text-align: right; font-size: 0.8em;">▼</div> <div style="padding: 2px;">Column</div> <div style="padding: 2px;">Pie</div> <div style="padding: 2px;">Funnel</div> </div>
Horizontal Category Axis label	<div style="border: 1px solid #ccc; padding: 2px;"> <div style="text-align: right; font-size: 0.8em;">▼</div> <div style="padding: 2px;">Actual Close Date</div> <div style="padding: 2px;">Status</div> <div style="padding: 2px;">Created on</div> <div style="padding: 2px;">Est. Close Date</div> </div>
Won data series value	<div style="border: 1px solid #ccc; padding: 2px;"> <div style="text-align: right; font-size: 0.8em;">▼</div> <div style="padding: 2px;">Actual Revenue</div> <div style="padding: 2px;">Est. Revenue</div> <div style="padding: 2px;">Predictive Score</div> <div style="padding: 2px;">Goal target</div> </div>
Lost data series value	<div style="border: 1px solid #ccc; padding: 2px;"> <div style="text-align: right; font-size: 0.8em;">▼</div> <div style="padding: 2px;">Actual Revenue</div> <div style="padding: 2px;">Est. Revenue</div> <div style="padding: 2px;">Predictive Score</div> <div style="padding: 2px;">Goal target</div> </div>

Answer:

Chart requirement

Configuration

Type of chart

	▼
Column	
Pie	
Funnel	

Horizontal Category Axis label

	▼
Actual Close Date	
Status	
Created on	
Est. Close Date	

Won data series value

	▼
Actual Revenue	
Est. Revenue	
Predictive Score	
Goal target	



Lost data series value

	▼
Actual Revenue	
Est. Revenue	
Predictive Score	
Goal target	

NEW QUESTION: 29

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 (LEAVE A REPLY)

Reference:

<https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/keep-forecast-data-up-to-date>

NEW QUESTION: 30

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

Answer: C (LEAVE A REPLY)

Reference:

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

NEW QUESTION: 31

You need to configure forecasting according to the requirements.

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

NOTE: Each correct selection is worth one point.

Requirement	Action
Include projected revenue by factory capacity.	<input type="checkbox"/> Set the hierarchical entity to Territory. <input type="checkbox"/> Set the rollup entity to Product. <input type="checkbox"/> Set the goal metric to Revenue. <input type="checkbox"/> Set the hierarchical entity to Product.
Include current revenue targets.	<input type="checkbox"/> Upload quota data for each territory. <input type="checkbox"/> Create a goal metric. <input type="checkbox"/> Create a goal target for revenue. <input type="checkbox"/> Upload a goal target from an Excel template.
Include both high confidence and won opportunities.	<input type="checkbox"/> Create a calculated column and add it to the column layout. <input type="checkbox"/> Add the Committed and Won values to the column layout. <input type="checkbox"/> Create a rollup column and add it to the column layout. <input type="checkbox"/> Add a calculated value to the Opportunities Forecast view.

Answer:

Requirement	Action
Include projected revenue by factory capacity.	<ul style="list-style-type: none"> Set the hierarchical entity to Territory. Set the rollup entity to Product. Set the goal metric to Revenue. Set the hierarchical entity to Product.
Include current revenue targets.	<ul style="list-style-type: none"> Upload quota data for each territory. Create a goal metric. Create a goal target for revenue. Upload a goal target from an Excel template.
Include both high confidence and won opportunities.	<ul style="list-style-type: none"> Create a calculated column and add it to the column layout. Add the Committed and Won values to the column layout. Create a rollup column and add it to the column layout. Add a calculated value to the Opportunities Forecast view.



Reference:

<https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/capture-forecast-category-opportunity>

<https://rocketcrm.co.uk/sales-forecasting-dynamics-365-new-feature/>

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NEW QUESTION: 32

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.

Requirement

Set up playbooks for tracking activities.

Settings
Activities
Templates
Categories

Configuration

Set up record types for playbooks.

Accounts and Contacts
Phone calls and Appointments
Accounts, Contacts, and Activities
Accounts, Contacts, and Sales literature

Answer:

The screenshot shows a configuration interface with two sections: 'Requirement' and 'Configuration'. In the 'Requirement' section, the text 'Set up playbooks for tracking activities.' is followed by a dropdown menu with options: Settings, Activities, Templates (highlighted with a red box), and Categories. In the 'Configuration' section, the text 'Set up record types for playbooks.' is followed by a dropdown menu with options: Accounts and Contacts (highlighted with a red box), Phone calls and Appointments, Accounts, Contacts, and Activities, and Accounts, Contacts, and Sales literature. A Microsoft logo is visible in the bottom left corner of the screenshot.

Reference:

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

NEW QUESTION: 33

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 use business process flows for all Dynamics 365 opportunities.

Some opportunities are closed before business process flow durations are calculated.

You need to ensure that business process flow duration values are calculated.

Solution: On the last stage of the business process flow, select Finish.

Does the solution meet the goal?

A. Yes

B. No

Answer: A ([LEAVE A REPLY](#))

NEW QUESTION: 34

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.

Requirement	Action
Add a price per unit to products.	<div style="border: 1px solid #ccc; padding: 5px;"><div style="text-align: right;">▼</div>Activate the product. Add a price list to the product. Add a price list to the opportunity. Make the product a write-in product.</div>
Correct prices for product lines.	<div style="border: 1px solid #ccc; padding: 5px;"><div style="text-align: right;">▼</div>Revise the product. Activate the product. Add a price list to the product. Add a price list to the opportunity.</div>

Answer:

Requirement	Action
Add a price per unit to products.	<div style="border: 1px solid #ccc; padding: 5px;"><div style="text-align: right;">▼</div>Activate the product. Add a price list to the product. <div style="border: 2px solid red; padding: 2px;">Add a price list to the opportunity.</div> Make the product a write-in product.</div>
Correct prices for product lines.	<div style="border: 1px solid #ccc; padding: 5px;"><div style="text-align: right;">▼</div>Revise the product. Activate the product. <div style="border: 2px solid red; padding: 2px;">Add a price list to the product.</div> Add a price list to the opportunity.</div>

Reference:

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

NEW QUESTION: 35

A company uses Dynamics 365 Sales.

You need to add an email activity to both a contact and its corresponding account without setting the Regarding field.

Where should you add the email activity?

- A. Dynamics 365 App for Outlook
- B. Quick Create form
- C. Contact record only
- D. Account record only

Answer: C (LEAVE A REPLY)

NEW QUESTION: 36

You are a salesperson using Dynamics 365. You receive customer phone calls and manage leads.

You need to qualify leads and send phone calls to sales representatives.

How should you manage each of the following situations? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Question	Record created
You want to convert a phone call. To which type of entity can you convert the call?	<input type="checkbox"/> Case <input type="checkbox"/> Lead
You qualify a lead. For which entity is a record created?	<input type="checkbox"/> Contact <input type="checkbox"/> Case

Answer:

Question	Record created
You want to convert a phone call. To which type of entity can you convert the call?	<input checked="" type="checkbox"/> Case <input type="checkbox"/> Lead
You qualify a lead. For which entity is a record created?	<input checked="" type="checkbox"/> Contact <input type="checkbox"/> Case

NEW QUESTION: 37

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

Answer: ([SHOW ANSWER](#))

NEW QUESTION: 38

A battery manufacturer wants to sell their batteries in boxes of 12 and cases of 24 boxes.

You need to set up a unit group so that the manufacturer can sell different quantities.

What should you create first?

- A. related unit
- B. unit of measure
- C. primary unit
- D. base unit

Answer: C ([LEAVE A REPLY](#))

Reference:

<https://docs.microsoft.com/en-us/dynamics365/sales-professional/create-unit-group-add-units>

NEW QUESTION: 39

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.

Requirement	Action
Provide CompanyB with pricing.	<ul style="list-style-type: none">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.	<ul style="list-style-type: none">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.	<ul style="list-style-type: none">Create a new quote.Revise the quote and change the currency to CAD.Convert the quote to an order.

Answer:

Requirement	Action
Provide CompanyB with pricing.	<ul style="list-style-type: none"> 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.	<ul style="list-style-type: none"> 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.	<ul style="list-style-type: none"> Create a new quote. Revise the quote and change the currency to CAD. Convert the quote to an order.

Reference:

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

NEW QUESTION: 40

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.

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.

Answer:

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.

NEW QUESTION: 41

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 Sales system administrator.

The sales team wants to use automated conversation starters.

You need to ensure that the controls are available to developers.

Solution: Remove any subscriptions associated with Microsoft Relationship Sales and disable JavaScript.

Does the solution meet the goal?

A. No

B. Yes

Answer: A ([LEAVE A REPLY](#))

NEW QUESTION: 42

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 Personalization settings for each user, change the default revenue type to System Calculated

B. In custom controls, change the default revenue setting to System Calculated

C. In the System Settings sales tab, change the default revenue type to System Calculated

D. In Opportunities, change the default value of the revenue type to System Calculated

Answer: D ([LEAVE A REPLY](#))

NEW QUESTION: 43

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: Use Unified Interface apps.

Does the solution meet the goal?

A. Yes

B. No

Answer: ([SHOW ANSWER](#))

Reference:

<https://docs.microsoft.com/en-us/dynamics365/customer-engagement/linkedin/add-sales-navigator-controlsforms>

NEW QUESTION: 44

A company uses Dynamics 365 Sales to track activities. The sales department plans to use leads.

You need to determine:

Which activities convert to leads.

Which field carries over from the activity to the lead.

Which feature should you use? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.



Requirement

Feature

Which activity type can users convert to leads?

	▼
Task	
Email	
Phone Call	
Appointment	

Which field carries over from the activity to the lead?

	▼
Subject	
Regarding	
Start Date	
Existing Contact	

Answer:

Requirement



Feature

Which activity type can users convert to leads?

	▼
Task	
Email	
Phone Call	
Appointment	

Which field carries over from the activity to the lead?

	▼
Subject	
Regarding	
Start Date	
Existing Contact	

Reference:

<https://community.learnmsdynamics.com/post/how-to-create-leads-in-microsoft-dynamics-365-5f157032469b481ed3ad3caa>

NEW QUESTION: 45

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.

You are configuring Dynamics 365 Sales for a US-based company as follows:

Utah to California is the West territory

Illinois to Colorado is the Central territory.

Maine to Indiana is the East territory.

The company wants the territories set up as follows:

Salespersons 1 and 2 sell in the West territory.

Salespersons 5 and 6 sell in the Central territory.

Salespersons 3 and 4 sell in the East territory.

Postal code for each state used as the location.

You need to set up the territories.

Solution:

Create the West territory, add the manager.

Add members for each territory and save.

Repeat for the Central and East territories.

Add connections to each territory.

Does the solution meet the goal?

A. Yes

B. No

Answer: ([SHOW ANSWER](#))

Reference:

<https://docs.microsoft.com/en-us/dynamics365/customerengagement/on-premises/admin/set-up-sales-territories-organize-business-markets-geographical-area?view=op-9-1>

<https://docs.microsoft.com/en-us/dynamics365/field-service/set-up-territories>

NEW QUESTION: 46

You need to create orders for large quantity purchases.

What are two possible ways to achieve this goal? Each correct answer presents a complete solution NOTE: Each correct selection is worth one point.

A. Create an invoice from the order record.

B. Make a copy of the quote and save it as won.

C. Select Won when prompted.

D. Select a Create order from the Quote record.

E. Select Convert to work order from the Opportunity record.

Answer: B,D ([LEAVE A REPLY](#))

Reference:

<https://docs.microsoft.com/en-us/dynamics365/sales-professional/create-orders-sp>

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NEW QUESTION: 47

You need to configure the system to handle all ticket sales.

What should you configure?

A. Discount Lists

B. Product Bundles

C. Product Catalog Settings

D. Goals

Answer: A ([LEAVE A REPLY](#))

Reference:

<https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/set-up-discount-list>

NEW QUESTION: 48

You need to set up the required sales tracking for multinational customers.

C? Each correct answer presents part of the solution,

NOTE: Each correct selection is worth one point.

- A. Associate the accounts in each country with the country sales territory in which it is located.
- B. Create a primary account for the customer and contacts for each country of operation.
- C. Create a primary account for the customer and assign it to the global territory.
- D. Create each country sales territory as a sub-territory of the global territory.
- E. Associate the customer accounts for each country with the primary account.

Answer: ([SHOW ANSWER](#))

NEW QUESTION: 49

A company uses Dynamics 365 Sales with Microsoft Exchange and server-side synchronization. All users have approved mailboxes. Some users report that emails will not send. You need to resolve the issue. What should you do?

- A. Add the email address to the email profile.
- B. Disable impersonation mode.
- C. Turn on automatic tracking.
- D. Test and enable the mailboxes.

Answer: ([SHOW ANSWER](#))

NEW QUESTION: 50

A company has two departments. Each department uses only custom forms and views designed for each department. Currently, all users can view all forms and views.

The company wants to improve usability for its users.

You need to limit users to only individual department forms and views.

What should you do?

- A. Create a site map for each department.
- B. Use a hierarchy security model.
- C. Use security roles.
- D. Create a model-driven app for each department.

Answer: C ([LEAVE A REPLY](#))

NEW QUESTION: 51

A company uses Dynamics 365 for Sales.

You need to reduce the number of pre-sales support days that are available based on the days the company is closed for public holidays.

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

NOTE: Each correct selection is worth one point.

Item	Value
Schedule type	<input type="text"/> ▼ Holiday Recurrence
Option	<input type="text"/> ▼ Number of days Owner

Answer:

Item	Value
Schedule type	<input type="text"/> ▼ Holiday Recurrence
Option	<input type="text"/> ▼ Number of days Owner

NEW QUESTION: 52

You manage a Dynamics 365 environment. You plan to implement business process flows from AppSource. You need to ensure that a user can install the business process flows. What should you do?

- A. In the Office 365 Admin center, assign Application proxy permissions to the user.
- B. Assign the Dynamics 365 System Customizer role to the user.
- C. Assign the Common Data Service User role to the user.
- D. in the Power Apps Admin center, assign Environment Maker permissions to the user.

Answer: B ([LEAVE A REPLY](#))

NEW QUESTION: 53

You use Dynamics 365 for Sales.

You need to add products to an invoice.

Which options should you use? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Scenario

Option

Add a product from an opportunity.

	▼
Existing Product	
Write-In Product	
Get Products	

Add a product from a price list.

	▼
Existing Product	
Write-In Product	
Get Products	

Add a product that does not exist in the product catalog.

	▼
Existing Product	
Write-In Product	
Get Products	

Answer:

Scenario

Option

Add a product from an opportunity.

	▼
Existing Product	
Write-In Product	
Get Products	

Add a product from a price list.

	▼
Existing Product	
Write-In Product	
Get Products	

Add a product that does not exist in the product catalog.



	▼
Existing Product	
Write-In Product	
Get Products	

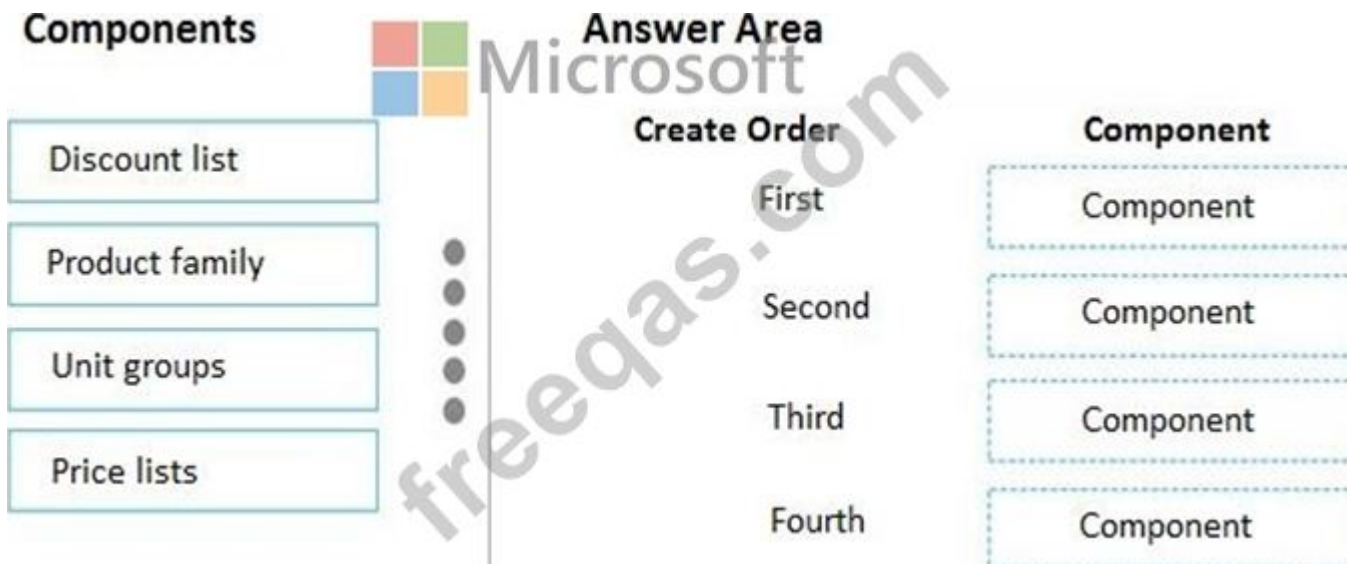
NEW QUESTION: 54

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.



Answer:



Reference:

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

NEW QUESTION: 55

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

Answer: C (LEAVE A REPLY)

NEW QUESTION: 56

You manage Dynamics 365 Sales. You have a sales territory named SalesTerritoryA which has an associated manager.

You need to create a new sales territory named SalesTerritoryB and assign the SalesTerritoryA manager to SalesTerritoryB.

Which four 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.

NOTE: More than one order of answer choices is correct. You will receive credit for any of the correct orders you select.

Actions

- Create a new sales territory.
- Associate the manager from SalesTerritoryA.
- Replace the manager from SalesTerritoryA with another manager.
- Change the name of SalesTerritoryA to SalesTerritoryB.
- Add members.

Answer Area

Answer:

Actions

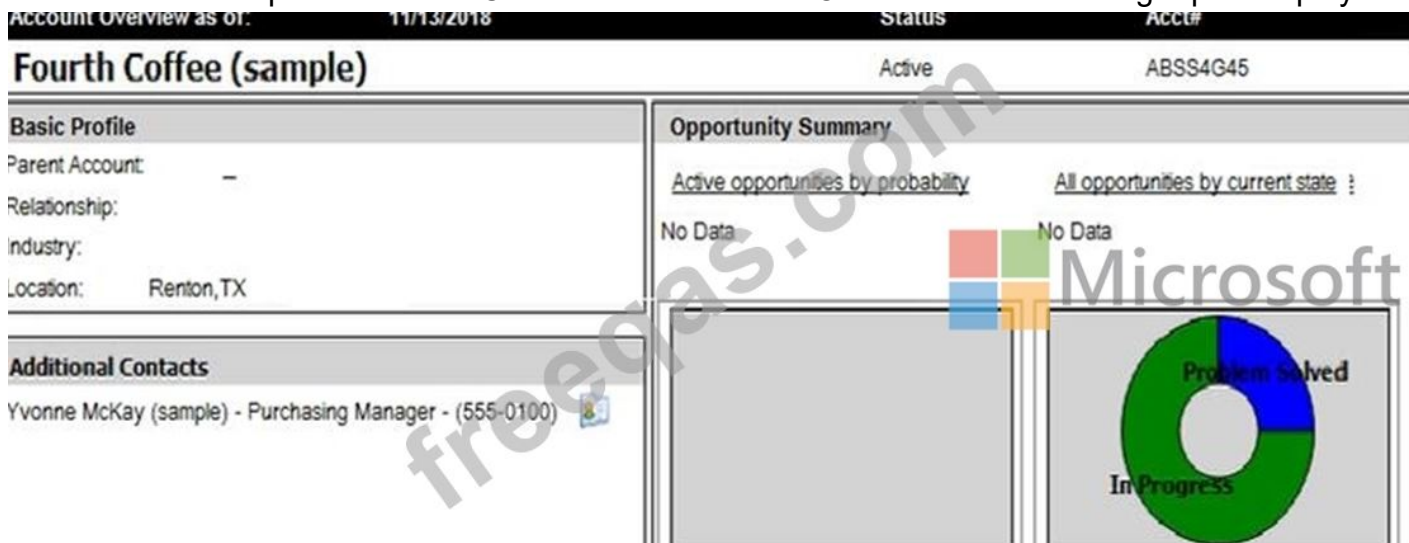
- Create a new sales territory.
- Associate the manager from SalesTerritoryA.
- Replace the manager from SalesTerritoryA with another manager.
- Change the name of SalesTerritoryA to SalesTerritoryB.
- Add members.

Answer Area

- Replace the manager from SalesTerritoryA with another manager.
- Create a new sales territory.
- Add members.
- Associate the manager from SalesTerritoryA.

NEW QUESTION: 57

You run a sales report for Fourth Coffee named Account Overview. The following report displays:



Use the drop-down menus to select the answer choice that answers each question based on the information presented in the graphic.

NOTE: Each correct selection is worth one point.

Question
Microsoft

Answer choice

Why is the satisfaction area blank?

There are no closed cases.
Users are not completing the satisfaction field.
The Reporting Service is down.
Cases with the problem solved have not been closed.

Which type of account is Fourth Coffee?

Active
Parent Account
Inactive
Child Account

Answer:

Question

Answer choice

Why is the satisfaction area blank?

There are no closed cases.
Users are not completing the satisfaction field.
The Reporting Service is down.
Cases with the problem solved have not been closed.

Which type of account is Fourth Coffee?

Active
Parent Account
Inactive
Child Account

NEW QUESTION: 58

A salesperson sends an active quote to a customer. The customer requests another quote that includes the original details from the opportunity.

You need to create multiple quotes.

What should you do?

- A. Close the quote and then create a quote from the opportunity.
- B. Create a revision to the active quote.
- C. Create a new opportunity.
- D. Create a new quote from the original opportunity.

Answer: A ([LEAVE A REPLY](#))

Reference:

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

<https://ellipsesolutions.com/dynamics-365-sales-managing-customer-quotes/>

NEW QUESTION: 59

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: ([SHOW ANSWER](#))

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).

NEW QUESTION: 60

A company uses Dynamics 365 Sales. The company uses their organizational structure to determine how to aggregate forecasts for each year.

The company divides a business unit into three separate units. Each unit will have a new manager.

You need to update the quotas for each user for the current fiscal year's forecast.

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

NOTE: Each correct selection is worth one point.

- A. Create and assign users to new resource groups for each manager.
- B. Create a new relationship between sites.
- C. Assign the users to their new managers.
- D. Upload the new quota amounts for each user.
- E. Adjust the forecast values directly.
- F. Update the target goal amount for each user.

Answer: C,D ([LEAVE A REPLY](#))

NEW QUESTION: 61

An administrator configures Dynamics 365 Sales to use embedded intelligence.

As part of the deployment, the following features are configured:

- * automated notification of a missed opportunity closing date
- * the web diem for sales is used for user communications
- * server-side synchronization configured to track incoming messages
- * automated meeting requests from incoming email messages

You need to determine which features are available for implementations of Microsoft Exchange.

Which product or products should you use for each feature? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Feature	Product
automated notification of a missed opportunity closing date	Exchange Online Exchange on-premises both versions of Exchange
the web client for sales is used for user communications	Exchange Online Exchange on-premises both versions of Exchange
the web client for sales is used for user communications	Exchange Online Exchange on-premises both versions of Exchange
server-side synchronization configured to track incoming messages	Exchange Online Exchange on-premises both versions of Exchange
server-side synchronization configured to track incoming messages	Exchange Online Exchange on-premises both versions of Exchange
automated meeting requests from incoming email messages	Exchange Online Exchange on-premises both versions of Exchange
automated meeting requests from incoming email messages	Exchange Online Exchange on-premises both versions of Exchange

Answer:

Answer Area

Feature	Product
automated notification of a missed opportunity closing date	Exchange Online
the web client for sales is used for user communications	Exchange on-premises both versions of Exchange
the web client for sales is used for user communications	Exchange Online Exchange on-premises both versions of Exchange
server-side synchronization configured to track incoming messages	Exchange Online Exchange on-premises both versions of Exchange
server-side synchronization configured to track incoming messages	Exchange Online Exchange on-premises both versions of Exchange
automated meeting requests from incoming email messages	Exchange Online
automated meeting requests from incoming email messages	Exchange on-premises both versions of Exchange

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NEW QUESTION: 62

A company is implementing Dynamics 365 Sales. The company has ten products and four territories.

Each territory must have a price list specific for the territory and must use these prices as default product prices.

You need to configure the price lists for the territories.

What should you do?

- A. Create a product family with each product list four times. Include the territory price for each product list.
- B. Create a price list with a discount list for each territory.
- C. Create a price list for each territory and add a territory relationship record.
- D. Create one price list and margin for each territory.

Answer: C (LEAVE A REPLY)

Reference:

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

NEW QUESTION: 63

You use Dynamics 365 for Sales.

You need to add products to an opportunity.

Which actions should you perform? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Scenario	Action
Products are associated with a quote record	<input type="checkbox"/> Manually add the products to the opportunity <input type="checkbox"/> Use the Get Products option <input type="checkbox"/> Associate the quote with the opportunity
Add a product bundle to the opportunity	<input type="checkbox"/> Add a write-in product <input type="checkbox"/> Add an existing product <input type="checkbox"/> Add the product bundle price list

Answer:

Scenario	Action
Products are associated with a quote record	<input checked="" type="checkbox"/> Manually add the products to the opportunity <input type="checkbox"/> Use the Get Products option <input type="checkbox"/> Associate the quote with the opportunity
Add a product bundle to the opportunity	<input type="checkbox"/> Add a write-in product <input checked="" type="checkbox"/> Add an existing product <input type="checkbox"/> Add the product bundle price list

NEW QUESTION: 64

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: Use Dynamics 365 AI for Sales.

Does the solution meet the goal?

A. Yes

B. No

Answer: B ([LEAVE A REPLY](#))

Reference:

<https://docs.microsoft.com/en-us/dynamics365/customer-engagement/linkedin/add-sales-navigator-controlsforms>

NEW QUESTION: 65

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.

Microsoft Parameter	Option
Entity	Lead Quote Opportunity Invoice
Date field	Actual Close Date Created on Date Final Decision Date
Revenue field	Total Amount Budget Amount Actual Revenue

Answer:

Parameter	Option
Entity	Lead Quote Opportunity Invoice
Date field	Actual Close Date Created on Date Final Decision Date
Revenue field	Total Amount Budget Amount Actual Revenue

NEW QUESTION: 66

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 only one product family.
- D. Set one product as a parent to another product.

Answer: C (LEAVE A REPLY)

Reference:

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

NEW QUESTION: 67

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	Answer Area
Update system settings.	Issue Discount does not appear on the opportunity line item.
Update the opportunity.	Discount is applied incorrectly.
Update the price list item.	Action Action
Update the opportunity product.	Action

Answer:

Actions	Answer Area
Update system settings.	Issue Discount does not appear on the opportunity line item.
Update the opportunity.	Discount is applied incorrectly.
Update the price list item.	Action Update the price list item.
Update the opportunity product.	Update system settings.

Reference:

<https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/set-up-discount-list>

NEW QUESTION: 68

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. Common Data Service

- B. System Customizer
- C. Knowledge Manager
- D. Sales Manager

Answer: ([SHOW ANSWER](#))

NEW QUESTION: 69

You are a Dynamics 365 Sales administrator for a company that has locations in five regions. The company's owner wants regional managers to update their own forecasts. The owner wants full transparency for all forecasts to all current and future employees.

You need to allow users to see the forecasts for every region.

What should you do?

- A. Add each security role to the forecast configuration.
- B. Grant users permission to view the Forecast Category field.
- C. Add the view privilege to each user's security role.
- D. Grant all security roles access in the forecast configuration.

Answer: C ([LEAVE A REPLY](#))

NEW QUESTION: 70

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 ([LEAVE A REPLY](#))

Reference:

<https://docs.microsoft.com/en-us/dynamics365/sales-professional/manage-users>

NEW QUESTION: 71

You are implementing Dynamics 365 Sales for a beverage company.

The company sells drinks by individual cans, by the dozen, or by the case of 48 cans as follows:

- * There are three flavors: strawberry, vanilla, and chocolate.
- * Each can costs S5.00
- * A dozen cans cost S55.00.
- * Each case has four dozen cans and costs \$200.00.
- * A combination case includes a dozen cans of each flavor and costs \$160.00.
- * Purchases of four or more cases get an extra 10 percent off the price.

You need to set up the product catalog.

Which components should you use? To answer, drag the appropriate components to the correct entry descriptions. 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.

Answer:

NEW QUESTION: 72

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.

Actions

- 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

Answer:

Answer Area

Install Versium Predict from Microsoft
AppSource



Authenticate Versium Predict

Add custom views using web resources

- 1 - Install Versium Predict from Microsoft AppSource
- 2 - Authenticate Versium Predict
- 3 - Add custom views using web resources

NEW QUESTION: 73

You are a Dynamics 365 Sales administrator. You set the fiscal year to begin in January. A sales manager needs a monthly forecast for the next three years that starts in August of the next year.

You need to configure the forecast using the fewest number of forecasts.

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

NOTE: Each correct selection is worth one point.

ANSWER AREA

Requirement	Configuration					
How many forecasts are needed?	<table border="1"><tr><td>1</td></tr><tr><td>1</td></tr><tr><td>3</td></tr><tr><td>4</td></tr><tr><td>5</td></tr></table>	1	1	3	4	5
1						
1						
3						
4						
5						
What is the starting period for the forecast?	<table border="1"><tr><td>next year</td></tr><tr><td>current year</td></tr><tr><td>next year</td></tr><tr><td>last year of the forecast</td></tr><tr><td>last open year</td></tr></table>	next year	current year	next year	last year of the forecast	last open year
next year						
current year						
next year						
last year of the forecast						
last open year						
How many periods are needed?	<table border="1"><tr><td>36</td></tr><tr><td>12</td></tr><tr><td>36</td></tr><tr><td>48</td></tr><tr><td>60</td></tr></table>	36	12	36	48	60
36						
12						
36						
48						
60						

Answer:

Answer Area

Requirement

How many forecasts are needed?

What is the starting period for the forecast?

How many periods are needed?

Configuration

1
1
3
4
5

next year
current year
next year
last year of the forecast
last open year

36
12
36
48
60



NEW QUESTION: 74

You manage a Dynamics 365 Sales environment.

You need to configure the default status for each lead.

Which status reason should you associate to each scenario? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Scenario	Status reason
A lead is created and contacted by phone.	<ul style="list-style-type: none"> New-Contacted Open-Contacted Qualified-New Qualified-Qualified
A lead has no contact method available.	<ul style="list-style-type: none"> Open-Cannot Contact Qualified-Cannot Contact Disqualified-Cannot Contact
A lead is ready to be an opportunity.	<ul style="list-style-type: none"> Qualified-New Qualified-Qualified Qualified-Closed



Answer:

Scenario	Status reason				
A lead is created and contacted by phone.	<table border="1"> <tr><td>New-Contacted</td></tr> <tr><td>Open-Contacted</td></tr> <tr><td>Qualified-New</td></tr> <tr><td>Qualified-Qualified</td></tr> </table>	New-Contacted	Open-Contacted	Qualified-New	Qualified-Qualified
New-Contacted					
Open-Contacted					
Qualified-New					
Qualified-Qualified					
A lead has no contact method available.	<table border="1"> <tr><td>Open-Cannot Contact</td></tr> <tr><td>Qualified-Cannot Contact</td></tr> <tr><td>Disqualified-Cannot Contact</td></tr> </table>	Open-Cannot Contact	Qualified-Cannot Contact	Disqualified-Cannot Contact	
Open-Cannot Contact					
Qualified-Cannot Contact					
Disqualified-Cannot Contact					
A lead is ready to be an opportunity.	<table border="1"> <tr><td>Qualified-New</td></tr> <tr><td>Qualified-Qualified</td></tr> <tr><td>Qualified-Closed</td></tr> </table>	Qualified-New	Qualified-Qualified	Qualified-Closed	
Qualified-New					
Qualified-Qualified					
Qualified-Closed					

NEW QUESTION: 75

A company uses Dynamics 365 Sales. The company does not use any customizations.

The system must create activity records for every interaction a salesperson has with customers and contacts.

You need to configure the system by using minimal customizations.

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

NOTE: Each correct selection is worth one point.

Activity	Action
Display activities for each contact in the account record.	<ul style="list-style-type: none"> Use the default configuration. Create a custom relationship between the activity and the contact. Add the activity to both the account and contact. Create a Power Automate flow to copy the activity from the contact to the account.
Ensure the creation date and the completion date of the activity are recorded separately.	<ul style="list-style-type: none"> Use the default configuration. Create a custom column for the creation date. Create a custom column for the completion date. Create a custom control.
View activities in Kanban view.	<ul style="list-style-type: none"> Use the default configuration. Add a custom control. Add a custom view. Add a Power Automate flow.

Answer:

Activity	Action
Display activities for each contact in the account record.	<ul style="list-style-type: none"> Use the default configuration. Create a custom relationship between the activity and the contact. Add the activity to both the account and contact. Create a Power Automate flow to copy the activity from the contact to the account.
Ensure the creation date and the completion date of the activity are recorded separately.	<ul style="list-style-type: none"> Use the default configuration. Create a custom column for the creation date. Create a custom column for the completion date. Create a custom control.
View activities in Kanban view.	<ul style="list-style-type: none"> Use the default configuration. Add a custom control. Add a custom view. Add a Power Automate flow.

Reference:

<https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/activity-kanban-view>

NEW QUESTION: 76

You need to determine the cause of the error for approved quotes.

Why does the error occur?

- A. The quote template is in Active mode.
- B. The quote is in Active state.

- C. The quote has been deleted.
- D. The opportunity is in Active state.

Answer: B (LEAVE A REPLY)

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NEW QUESTION: 77

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:

Answer Area Microsoft

Revise the quote.

Add existing products from the products subgrid.

Activate the quote.

- 1 - Revise the quote.
- 2 - Add existing products from the products subgrid.
- 3 - Activate the quote.

NEW QUESTION: 78

You are a Dynamics 365 Sales administrator. The sales team has questions about competitor tracking.

You need to provide answers to the questions from the sales team.
 How should you respond? To answer, select the appropriate options in the answer area.
 NOTE: Each correct selection is worth one point.

Question	Response
You need to add the winning competitor to an opportunity. Where should you perform this action?	<input type="text"/> the opportunity record the opportunity close record the competitor record
You need to track the team's performance against competitors? Which report should you run?	<input type="text"/> Sales History Competitor Win/Loss

Answer:

Question	Response
You need to add the winning competitor to an opportunity. Where should you perform this action?	<input type="text"/> the opportunity record <input checked="" type="checkbox"/> the opportunity close record the competitor record
You need to track the team's performance against competitors? Which report should you run?	<input type="text"/> Sales History <input checked="" type="checkbox"/> Competitor Win/Loss

Reference:

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

NEW QUESTION: 79

You are configuring Dynamics 365 Sales Insights.
 You need to configure the system to meet the following requirements:
 Use artificial intelligence (AI) to rate all open leads on whether they will convert to an opportunity.
 Use AI to improve expected future sales numbers over the fiscal year.
 Create a sequence of activities for each lead to help the salespeople improve sales.
 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	Requirement	Feature
Predictive lead scoring	Use AI to rate all open leads on whether they will convert to an opportunity.	<input type="text"/>
Premium forecasting	Use AI to improve expected future sales numbers over the fiscal year.	<input type="text"/>
Sales accelerator	Create a sequence of activities for each lead to help the salespeople improve sales.	<input type="text"/>
Productivity intelligence		

Answer:

Features	Requirement	Feature
<input checked="" type="checkbox"/> Predictive lead scoring	Use AI to rate all open leads on whether they will convert to an opportunity.	<input checked="" type="checkbox"/> Predictive lead scoring
<input checked="" type="checkbox"/> Premium forecasting	Use AI to improve expected future sales numbers over the fiscal year.	<input checked="" type="checkbox"/> Premium forecasting
<input type="checkbox"/> Sales accelerator	Create a sequence of activities for each lead to help the salespeople improve sales.	<input type="checkbox"/> Sales accelerator
<input checked="" type="checkbox"/> Productivity intelligence		

Reference:

<https://docs.microsoft.com/en-us/dynamics365/ai/sales/configure-predictive-lead-scoring>

<https://docs.microsoft.com/en-us/dynamics365/ai/sales/configure-premium-forecasting>

<https://docs.microsoft.com/en-us/dynamics365/ai/sales/enable-configure-sales-accelerator>

NEW QUESTION: 80

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.

Requirement	Value or action
Modification to make	<div style="border: 1px solid gray; padding: 5px;"> <div style="background-color: #f0f0f0; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> ▼ </div> <div style="border: 1px solid gray; padding: 2px;"> <p>Use a filter</p> <p>Alter the existing chart</p> <p>Create a new chart</p> </div> </div>
Value to use	<div style="border: 1px solid gray; padding: 5px;"> <div style="background-color: #f0f0f0; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> ▼ </div> <div style="border: 1px solid gray; padding: 2px;"> <p>Status</p> <p>Status Reason</p> <p>Completed</p> </div> </div>

Answer:

Modification to make

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

Value to use

	▼
Status	
Status Reason	
Completed	

NEW QUESTION: 81

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

Answer: B (LEAVE A REPLY)

Reference:

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

NEW QUESTION: 82

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. Salesperson
- B. Common Data Service
- C. CEO - Business Manager
- D. Marketing Professional

Answer: C ([LEAVE A REPLY](#))

NEW QUESTION: 83

A salesperson progresses through the Lead to Opportunity sales process.



You need to identify what needs to be completed to enter the next stage.

Which action should you perform to advance the business process to each subsequent stage? To answer, drag the appropriate actions to the correct stages. 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

- Qualify the lead
- Associate a quote to the lead
- Associate an opportunity to the lead
- Complete all required fields in the stage

Answer Area

Current stage

- Qualify
- Develop
- Propose

Action

Three empty dashed boxes for drag-and-drop actions.

Answer:

Actions

- Qualify the lead
- Associate a quote to the lead
- Associate an opportunity to the lead
- Complete all required fields in the stage

Answer Area

Current stage

- Qualify
- Develop
- Propose

Action

Three dashed boxes with actions placed inside them: "Qualify the lead" (under Qualify), "Associate an opportunity to the lead" (under Develop), and "Associate a quote to the lead" (under Propose).

Reference:

<https://docs.microsoft.com/en-us/dynamics365/sales/nurture-sales-from-lead-order-sales>

NEW QUESTION: 84

A company uses Dynamics 365 Sales.

You need to associate a competitor with each closed opportunity for reporting.

What should you do?

- A. Select the Follow option for the competitor.
- B. Add the competitor to the opportunity close record.
- C. Create a user post for the competitor.
- D. Enable auditing for the competitor entity.

Answer: B (LEAVE A REPLY)

Reference:

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

NEW QUESTION: 85

You are a sales representative and use Dynamics 365 Sales.

You are working with the following lead record:

The screenshot displays the Dynamics 365 Sales interface for a lead record. The lead is named Jim Glynn, with a profile picture showing the initials 'JG'. The lead source is listed as '---'. The lead is currently in the 'Qualify (1 Min)' stage, which is active for 1 minute. The interface shows a 'Summary' tab with the following contact information: Topic: Interested in Product, First Name: Jim, Last Name: Glynn, Job Title: CEO, Business Phone: ---, Mobile Phone: ---, and Email: ---. A 'Next Stage' dialog box is open, allowing the user to select the answer choice for each question based on the information presented. The dialog box includes the following questions and answers: 'Existing Contact?' (checked), 'Existing Account?' (---), 'Purchase Timeframe' (---), 'Estimated Budget' (---), 'Purchase Process' (---), 'Identify Decision Maker' (checked and completed), and 'Capture Summary' (---). A 'Next Stage' button is located at the bottom of the dialog box. The Microsoft logo is visible in the bottom left corner of the interface.

Use the drop-down menus to select the answer choice that answers each question based on the information presented in the graphic.

NOTE: Each correct selection is worth one point.

Question	Answer Choice
You need to move to the Develop stage. What should you do?	<input type="checkbox"/> Qualify the Lead <input type="checkbox"/> Select Next Stage <input type="checkbox"/> Select Develop
Which new record or records are created?	<input type="checkbox"/> only an Opportunity <input type="checkbox"/> Only an Account and a Contact <input type="checkbox"/> only an Account and an Opportunity <input type="checkbox"/> an Account, a Contact, and an Opportunity

Answer:

Question	Answer Choice
You need to move to the Develop stage. What should you do?	<input checked="" type="checkbox"/> Qualify the Lead <input type="checkbox"/> Select Next Stage <input type="checkbox"/> Select Develop
Which new record or records are created?	<input type="checkbox"/> only an Opportunity <input type="checkbox"/> Only an Account and a Contact <input checked="" type="checkbox"/> only an Account and an Opportunity <input type="checkbox"/> an Account, a Contact, and an Opportunity

NEW QUESTION: 86

A company uses Dynamics 365 Sales.

You need to change the description field on the quote.

Which state allows you to make the change?

- A. Active
- B. Closed
- C. Won
- D. Draft

Answer: D (LEAVE A REPLY)

NEW QUESTION: 87

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 (LEAVE A REPLY)

Reference:

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

NEW QUESTION: 88

A customer uses Dynamics 365 Sales and Sales insights sales accelerator. The company wants to use an automatic activity generator. You need to set up the generator. Which tool should you use? To answer, drag the appropriate tools to the correct scenarios. Each tool 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.



Answer:



NEW QUESTION: 89

You need to add the unfavorable credit and reference check reasons to the RFQ close process. What should you do?

- A. Create custom activities for the credit and reference checks.
- B. Add a stage to the business process flow.
- C. Convert the credit and reference activities to an opportunity.
- D. Delete the RFQ Lead record.
- E. Create custom status reasons.

Answer: (SHOW ANSWER)

Reference:

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

NEW QUESTION: 90

A company manufactures widgets. Widgets can be sold in the following ways:

Unit	Base unit	Description
Box		Contains 2 widgets
Case	Box	Contains 12 boxes
Pallet	Case	Contains 12 cases

The company discovers that customers want to buy widgets individually. You need to add a unit named Each.

- A. Create the unit Each with Box as the base unit.
- B. Update the unit Box with Each as the base unit.
- C. Set Each as the primary unit.
- D. Make Each the base unit for all units.

Answer: C (LEAVE A REPLY)

Reference:

<https://docs.microsoft.com/en-us/dynamics365/sales-professional/create-unit-group-add-units>

NEW QUESTION: 91

You are consulting for a company that is installing Microsoft Power BI to work with a Dynamics 365 Sales application.

The administrator must configure each required option to successfully integrate the Sales Analytics template for use in Dynamics 365 Sales.

You need to identify which option to select.

Which option should you use? To answer, select the appropriate option in the answer area.

NOTE: Each correct selection is worth one point.

Answer Area



Answer:



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NEW QUESTION: 92

You use opportunities with products and price lists in Dynamics 365 for Sales.

You need to add products than exist in PriceListA and PriceListB to an opportunity.

Which actions should you perform? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Requirement	Action
Add the products to the opportunity.	<div style="border: 1px solid gray; padding: 2px;"> <div style="background-color: #f0f0f0; padding: 2px;">▼</div> <div style="padding: 2px;"> <p>Add both price lists to the opportunity and add the products from both PriceListA and PriceListB</p> <p>Add the products from PriceListA, change to PriceListB, and add the remaining products</p> <p>Add the products to the opportunity and specify PriceListA or PriceListB on the product</p> </div> </div>
Select Recalculate on an opportunity.	<div style="border: 1px solid gray; padding: 2px;"> <div style="background-color: #f0f0f0; padding: 2px;">▼</div> <div style="padding: 2px;"> <p>Each product is recalculated using the current list price both PriceListA and PriceListB</p> <p>The estimated revenue is recalculated according to the prices currently displayed on the product line items grid</p> <p>The products on the active price list in the opportunity are recalculated according to current list price</p> </div> </div>

Answer:

Requirement	Action
Add the products to the opportunity.	<div style="border: 1px solid gray; padding: 2px;"> <div style="background-color: #f0f0f0; padding: 2px;">▼</div> <div style="padding: 2px;"> <p>Add both price lists to the opportunity and add the products from both PriceListA and PriceListB</p> <p style="border: 1px solid red;">Add the products from PriceListA, change to PriceListB, and add the remaining products</p> <p>Add the products to the opportunity and specify PriceListA or PriceListB on the product</p> </div> </div>
Select Recalculate on an opportunity.	<div style="border: 1px solid gray; padding: 2px;"> <div style="background-color: #f0f0f0; padding: 2px;">▼</div> <div style="padding: 2px;"> <p>Each product is recalculated using the current list price both PriceListA and PriceListB</p> <p>The estimated revenue is recalculated according to the prices currently displayed on the product line items grid</p> <p>The products on the active price list in the opportunity are recalculated according to current list price</p> </div> </div>

NEW QUESTION: 93

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 (LEAVE A REPLY)

Reference:

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

NEW QUESTION: 94

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 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: Create a Power Automate flow to track the activities.

Does the solution meet the goal?

A. Yes

B. No

Answer: B (LEAVE A REPLY)

Activity tracking is enabled in the Playbook template.

Reference:

<https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/track-playbook-activities>

NEW QUESTION: 95

You are the Dynamics 365 administrator for a group of financial advisors.

Advisors must use one business process flow to guide them through the standard lead to invoice process.

Each entity has the following number of stages and steps:

Entity	Number of Stages	Number of Steps per Stage
Lead	10	10
Opportunity	10	10
Quote	10	10
Order	10	10
Invoice	10	10

You need to modify the business process flow to make it valid.

A. total number of steps

B. number of steps per stages

C. number of entities

D. total number of stages

Answer: D (LEAVE A REPLY)

The total number of stages here would be 50 which is more than the maximum limit of 30.

Reference:

<https://docs.microsoft.com/en-us/dynamics365/customerengagement/on-premises/customize/business-process-flows-overview?view=op-9-1>

NEW QUESTION: 96

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 ([LEAVE A REPLY](#))

Reference:

<https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/keep-forecast-data-up-to-date>

NEW QUESTION: 97

You need to fix the opportunity fading issue that EmployeeB reports. What should you update?

A. Health score grading

B. Activity influence

C. Communication frequency

D. Exchange data

Answer: A ([LEAVE A REPLY](#))

NEW QUESTION: 98

You need to resolve the issue for PreferredCustomerA, What should you create?

A. a product catalog for each country

B. a discount list for Preferred Customers

C. a price list for the currency of each country

D. a product bundle for each country

E. a playbook category

Answer: C ([LEAVE A REPLY](#))

Reference:

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

NEW QUESTION: 99

A company uses Dynamics 365 Sales.

A sales manager wants a salesperson to send an email activity to a marketing list. The manager wants to track the successes and failures of the emails in one view. The salesperson must be limited to sending only this email activity to the marketing list. You need to recommend which feature the manager should use.

What should you recommend?

A. campaign

- B. quick campaign
- C. customer Journey
- D. direct email

Answer: D ([LEAVE A REPLY](#))

NEW QUESTION: 100

A company uses Dynamics 365 Sales insights predictive modeling. The prediction accuracy score no longer meets the company's standards. You need to resolve this issue. What should you do?

- A. Add a new model.
- B. Change the business process flow that it is referencing.
- C. Refresh the data.
- D. Retrain the model.

Answer: ([SHOW ANSWER](#))

NEW QUESTION: 101

A company uses Dynamics 365 Sales. You add the Kanban control to the Opportunity entity. You plan to implement Kanban views in the system. The implementation must accomplish the following:

Set up opportunities so they are visible in Kanban views.

Ensure that the default view displays the opportunities in the sales cycle.

Ensure that users know how to change the status in the Kanban status view without opening the full record.

You need to complete the Kanban setup.

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

NOTE: Each correct selection is worth one point.

Requirement

Action

Set up Kanban.

In App Settings, select the correct setting.
On the View menu, select the correct view.
In Advanced settings, select the correct setting.
On the command bar, select Show As, and then select the correct setting.

View the opportunities
in the sales cycle.



Change the Kanban type to Status.
Change the view to All Opportunities.
Change the view to Partner Opportunities.
Change the Kanban type to a business process flow.

Change the status
to the same status
view.

Drag the opportunity to another column.
Create a new opportunity with the correct status.
Drag the opportunity to the bottom of the column.
Create a lead and qualify the lead with the new status.

Answer:

Requirement	Action					
Set up Kanban.	<table border="1"><tr><td></td></tr><tr><td>In App Settings, select the correct setting.</td></tr><tr><td>On the View menu, select the correct view.</td></tr><tr><td>In Advanced settings, select the correct setting.</td></tr><tr><td>On the command bar, select Show As, and then select the correct setting.</td></tr></table>		In App Settings, select the correct setting.	On the View menu, select the correct view.	In Advanced settings, select the correct setting.	On the command bar, select Show As, and then select the correct setting.
In App Settings, select the correct setting.						
On the View menu, select the correct view.						
In Advanced settings, select the correct setting.						
On the command bar, select Show As, and then select the correct setting.						
View the opportunities in the sales cycle.	<table border="1"><tr><td></td></tr><tr><td>Change the Kanban type to Status.</td></tr><tr><td>Change the view to All Opportunities.</td></tr><tr><td>Change the view to Partner Opportunities.</td></tr><tr><td>Change the Kanban type to a business process flow.</td></tr></table>		Change the Kanban type to Status.	Change the view to All Opportunities.	Change the view to Partner Opportunities.	Change the Kanban type to a business process flow.
Change the Kanban type to Status.						
Change the view to All Opportunities.						
Change the view to Partner Opportunities.						
Change the Kanban type to a business process flow.						
Change the status to the same status view.	<table border="1"><tr><td></td></tr><tr><td>Drag the opportunity to another column.</td></tr><tr><td>Create a new opportunity with the correct status.</td></tr><tr><td>Drag the opportunity to the bottom of the column.</td></tr><tr><td>Create a lead and qualify the lead with the new status.</td></tr></table>		Drag the opportunity to another column.	Create a new opportunity with the correct status.	Drag the opportunity to the bottom of the column.	Create a lead and qualify the lead with the new status.
Drag the opportunity to another column.						
Create a new opportunity with the correct status.						
Drag the opportunity to the bottom of the column.						
Create a lead and qualify the lead with the new status.						

Reference:

<https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/opportunity-kanban-view>

NEW QUESTION: 102

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.

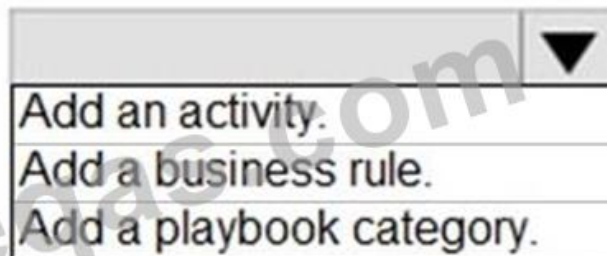
What should you do? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Requirement

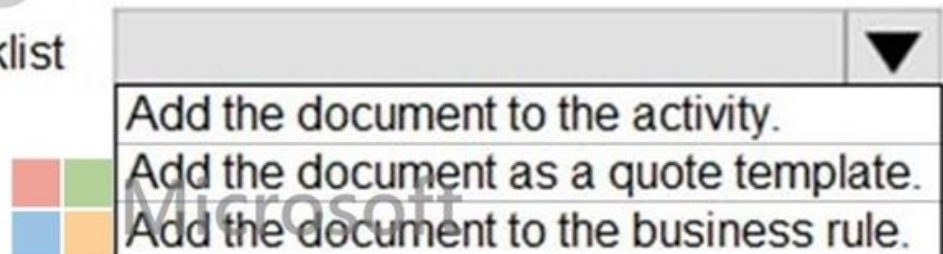
Action

Follow-up contact



A dropdown menu with a downward arrow on the right. The menu is open, showing three options: "Add an activity.", "Add a business rule.", and "Add a playbocok category." (Note the typo in the original image).

Sales Manager checklist



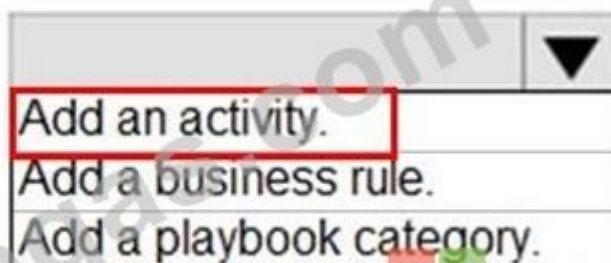
A dropdown menu with a downward arrow on the right. The menu is open, showing three options: "Add the document to the activity.", "Add the document as a quote template.", and "Add the document to the business rule." To the left of the menu is a small icon consisting of four colored squares (red, green, blue, orange) arranged in a 2x2 grid.

Answer:

Requirement

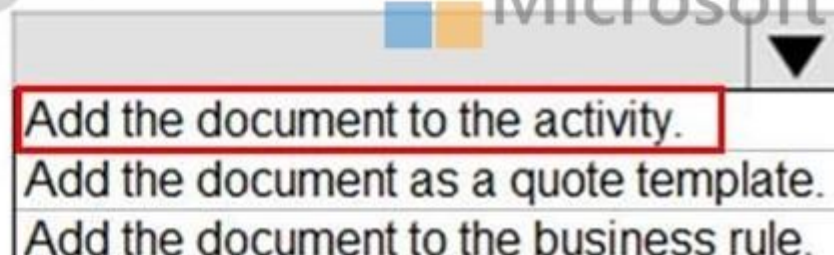
Action

Follow-up contact



A dropdown menu with a downward arrow on the right. The menu is open, showing three options: "Add an activity.", "Add a business rule.", and "Add a playbocok category." (Note the typo in the original image). The first option, "Add an activity.", is highlighted with a red rectangular box.

Sales Manager checklist



A dropdown menu with a downward arrow on the right. The menu is open, showing three options: "Add the document to the activity.", "Add the document as a quote template.", and "Add the document to the business rule." To the left of the menu is a small icon consisting of four colored squares (red, green, blue, orange) arranged in a 2x2 grid. The first option, "Add the document to the activity.", is highlighted with a red rectangular box.

Reference:

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

NEW QUESTION: 103

A company uses Dynamics 365 Sales.

You need to change the description field on the quote.

Which state allows you to make the change?

- A. Active
- B. Closed
- C. Draft
- D. Won

Answer: C ([LEAVE A REPLY](#))

NEW QUESTION: 104

A sales representative at a company uses Dynamics 365 Sa4es. The representative is assigned the Salesperson security role The representative requires a list that has only full name, address, phone number, and opportunity amount. The system does not provide this setup by default. Other sales representatives must be able to display the same information and format when necessary.

You need to set up the system.

What should you create?

- A. system view
- B. personal view, and share it with the other representatives
- C. system dashboard
- D. report that is sent to the team once a day

Answer: ([SHOW ANSWER](#))

NEW QUESTION: 105

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: ([SHOW ANSWER](#))

NEW QUESTION: 106

A company uses Dynamics 365 Sales. The company plans to use Microsoft SharePoint to organize documents.

All access to documents must be through Dynamics 365 Sales. You must limit document access to only salespeople.

You need to set up SharePoint for use.

What should you set up for each requirement? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

The screenshot shows an 'Answer Area' with two requirements and a list of setup actions. The requirements are 'Document management through Dynamics 365 Sales' and 'Access limited to salespeople'. The setup actions are: 'Configure document management and SharePoint Online.', 'Configure Exchange Online and SharePoint Online.', 'Configure SharePoint Connector and SharePoint Online.', 'Assign security roles in Dynamics 365 Sales only.', 'Assign security in SharePoint only.', 'Assign security roles in Dynamics 365 Sales only.', 'Assign Microsoft Security Group permissions in SharePoint.', and 'Assign security in SharePoint and security roles in Dynamics 365 Sales.'

Answer:

The screenshot shows the same 'Answer Area' as above, but with the correct setup actions highlighted in red: 'Configure document management and SharePoint Online.', 'Configure SharePoint Connector and SharePoint Online.', 'Assign security roles in Dynamics 365 Sales only.', and 'Assign security in SharePoint and security roles in Dynamics 365 Sales.'

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NEW QUESTION: 107

You need to handle large quantity opportunities.

Which four 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

- Navigate to Sales Hub and select **Opportunities**.
- Edit a product record.
- Navigate to the Additional detail tab.
- Navigate to Sales Hub and select **Products**.
- Navigate to the Quotes tab.
- Edit an opportunity record.
- Select **Get Products**.

Answer Area



Answer:

Answer Area

- Navigate to Sale Hub and select Opportunities.
- Edit an opportunity record.
- Navigate to the Quotes tab.

- 1 - Navigate to Sale Hub and select Opportunities.
- 2 - Edit an opportunity record.
- 3 - Navigate to the Quotes tab.

Reference:

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

NEW QUESTION: 108

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. No
- B. Yes

Answer: A (LEAVE A REPLY)

NEW QUESTION: 109

You are a sales manager at an international company using Dynamics 365 Sales.

You need to set up the product catalog.

Which four 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

- Add the product grid on order forms.
- Translate product names.
- Create product families.
- Add price list items.
- Revise a product.
- Create price lists.
- Create a unit group.

Answer area**Answer:**

Answer Area

- Create a unit group.
- Create product families.
- Create price lists.
- Add price list items.

- 1 - Create a unit group.
- 2 - Create product families.
- 3 - Create price lists.
- 4 - Add price list items.

NEW QUESTION: 110

You need to implement dashboards.

Which URL should you use?

- A. <https://bellowscollege.dynamics.com>
- B. <https://bellowscollege.crm.dynamics.com>
- C. <https://crm.bellowscollege.dynamics.com>
- D. <http://bellowscollege.crm.dynamics.com>

Answer: B ([LEAVE A REPLY](#))

NEW QUESTION: 111

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

Answer: C ([LEAVE A REPLY](#))

NEW QUESTION: 112

You are a Dynamics 365 for Sales environment.

You need to implement the Social Selling Assistant.

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

NOTE: Each correct selection is worth one point.

Requirement	Technology or feature
Install and configure additional required software.	<input type="checkbox"/> Social engagement <input type="checkbox"/> Dynamics 365 AI for Sales
Ensure that Social Assistant can be used on a dashboard	<input type="checkbox"/> Relationship Assistant <input type="checkbox"/> Search topics

Answer:

Requirement	Technology or feature
Install and configure additional required software.	<input type="checkbox"/> Social engagement <input type="checkbox"/> Dynamics 365 AI for Sales
Ensure that Social Assistant can be used on a dashboard	<input type="checkbox"/> Relationship Assistant <input type="checkbox"/> Search topics

:

NEW QUESTION: 113

A sales manager asks you to add a reason named DealLost to mark opportunities closed as lost.

You need to modify entity fields.

Which two entity fields should you modify? Each correct answer presents part of the solution.

NOTE: Each correct selection is worth one point.

- A. Opportunity Line
- B. Opportunity Sales Process
- C. Opportunity
- D. Opportunity Relationship
- E. Opportunity Close

Answer: C,E ([LEAVE A REPLY](#))

Reference:

<https://community.dynamics.com/365/sales/f/dynamics-365-for-sales-forum/377163/customize-opportunity-close>

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

NEW QUESTION: 114

You need to resolve the issue UserA is experiencing.

Where should you add UserA?

- A. Field Security Profile
- B. Office 365 group
- C. Business Unit
- D. Team

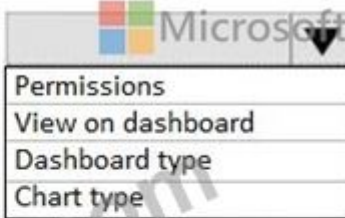
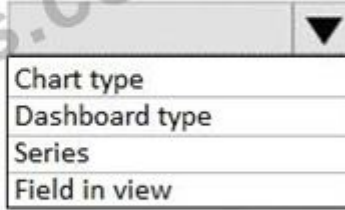
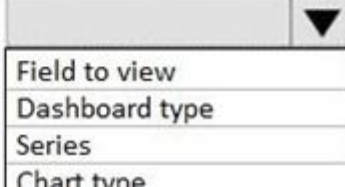
Answer: ([SHOW ANSWER](#))

NEW QUESTION: 115

You need to resolve the issues on the ticket's dashboard.

Which configurations should you change? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Scenario	Configuration
Tickets dashboard	
Age groups chart	
Groups of tickets chart	

Answer:

Scenario

Configuration

Tickets dashboard

	▼
Permissions	
View on dashboard	
Dashboard type	
Chart type	

 Age groups chart

	▼
Chart type	
Dashboard type	
Series	
Field in view	

Groups of tickets chart

	▼
Field to view	
Dashboard type	
Series	
Chart type	

NEW QUESTION: 116

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.

Answer: A,D (LEAVE A REPLY)

- If there is any draft or active quote associated with opportunity and you close the opportunity as won then the below error message is display in alert: "Opportunity cannot be closed There are still active or draft quotes associated with this opportunity. These must be closed before the opportunity can be closed. If you contact support, please provide the technical details.

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