

MB-210^{Q&As}

Microsoft Dynamics 365 Sales

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QUESTION 1

DRAG DROP A sates manager needs to add a new business closure. You need to configure a new business closure schedule. 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.

Select and Place:

| Open Scheduling from the Customer Service Hub | |
|--|--|
| Select New | |
| Modify the Closure dialog pop-up | |
| Select Business Closures from Settings | |
| Correct Answer: | |
| Correct Ariswer. | |
| Coffect Allswer. | Select New |
| Conect Answer. | Select New Modify the Closure dialog pop-up |
| Conect Answer. | Modify the Closure dialog |

Schedule a new business closure

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Make sure that you have the required security role or equivalent permissions. More information: Manage security roles in service scheduling

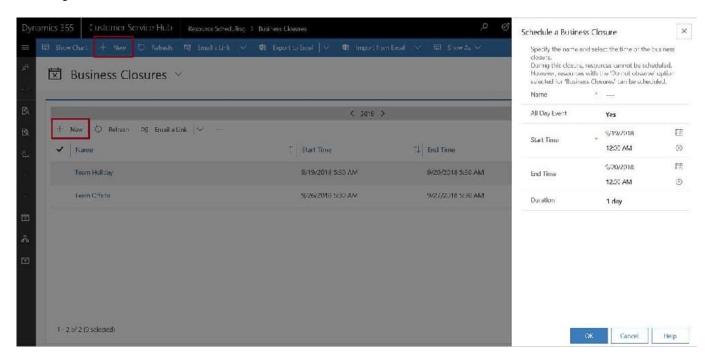
In the Customer Service Hub sitemap, go to Scheduling.

From the list of entity records, select Settings>; Business Closures.

The Business Closures view is displayed. You can switch between various system views using the drop-down menu.

Select any existing record to see additional options in the command bar

On the command bar, select New to schedule a new business closure. You can also select New from the business closure grid to create a new business closure record.



A quick create dialog box is displayed.

In the Schedule a Business Closure dialog box, type or modify information in the text boxes:

In the Name box, type a name that describes the purpose of the closure.

The first 12 characters of the name appear on each day of the closure on the calendar view of the affected resource\\'s Work Hours.

If the closure is an all-day event, select the All Day Event check box. The application automatically enters the duration of 1 day.

In the Start Time and End Time boxes, enter the start and end date and time for the closure.

If you want to enter duration instead of an end time, select the length of the closure in the Duration box. The application automatically calculates the end time for you. If you want to enter a specific time period, clear the All Day Event check

box. You can then specify the hours during which your organization will be closed.

To save this business closure, select OK.



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

QUESTION 2

| 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: |
| 1. |
| Utah to California is the West territory |
| 2. |
| Illinois to Colorado is the Central territory. |
| 3. |
| Maine to Indiana is the East territory. |
| The company wants the territories set up as follows: |
| 1. |
| Salespersons 1 and 2 sell in the West territory. |
| 2. |
| Salespersons 5 and 6 sell in the Central territory. |
| 3. |
| Salespersons 3 and 4 sell in the East territory. |
| 4. |
| Postal code for each state used as the location. |
| You need to set up the territories. |
| Solution: |
| 1. |
| Create the West territory, add the manager, and save. |
| 2. |
| Repeat for the Central and East territories. |
| 3. |

Add the members for each territory.

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4.

Select Related under each territory and select the postal codes applicable for each territory.

Does the solution meet the goal?

A. Yes

B. No

Correct Answer: A

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

QUESTION 3

HOTSPOT

An organization uses Dynamics 365 Sales to manage customer relationships.

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

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

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

NOTE: Each correct selection is worth one point.

Hot Area:

Configure a record creation and update rule. Configure a business process flow. Create a lead Specify auto-response settings Specify conditions for records creation

Correct Answer:

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Ensure an auto response is sent

Configure a record creation and update rule.

Configure a business process flow.

Create a lead



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

QUESTION 4

HOTSPOT

You are a Dynamics 365 Sales consultant for a food service company. The company caters for client companies.

The company wants to set up a product bundle so that the sales staff does not forget items when they create an opportunity.

The lunch bundle is created at \$200.00. It will include the following.

| Product | Quantity | Unit Cost | Amount | Configuration |
|----------|----------|-----------|----------|---------------|
| Sandwich | 50 | \$5.00 | \$250.00 | Required |
| Napkins | 50 | \$0.25 | \$12.50 | Optional |
| Soda | 50 | \$1.00 | \$50.00 | Optional |

You need to explain how the sales staff should manage the product bundle in the opportunity.

What should they do for each scenario? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

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Scenario Action Determine the price of the product bundle. Use the lunch bundle price. Add the prices of the sandwiches, napkins, and sodas. Add the lunch bundle price and the prices of the napkins and sodas. Subtract the prices of the napkins and sodas from the lunch bundle price. Increase the number of sodas at no additional charge. Increase the quantity of sodas in the line item. Add a new line item for sodas and override the price. Add a new line item for sodas with the default price. Delete the soda line item from the bundle and add a new line item for all the sodas with the default price. Increase the number of sandwiches and charge the price list price for each additional sandwich. Increase the quantity of sandwiches in the line item. Add another line item for sandwiches and override the price. Add another line item for sandwiches with the default price. Delete the sandwich line item from the bundle and add a new line item for all the sandwiches with the default price.

Correct Answer:

| Scenario | Action | |
|---|--|---|
| Determine the price of the product bundle. | | ~ |
| | Use the lunch bundle price. | |
| | Add the prices of the sandwiches, napkins, and sodas. | |
| | Add the lunch bundle price and the prices of the napkins and sodas. | |
| | Subtract the prices of the napkins and sodas from the lunch bundle price. | |
| Increase the number of sodas at no additional charge. | | ~ |
| | Increase the quantity of sodas in the line item. | |
| | Add a new line item for sodas and override the price. | |
| | Add a new line item for sodas with the default price. | |
| | Delete the soda line item from the bundle and add a new | |
| | line item for all the sodas with the default price. | |
| Increase the number of sandwiches and charge | | ~ |
| the price list price for each additional sandwich. | Increase the quantity of sandwiches in the line item. | |
| | Add another line item for sandwiches and override the price. | |
| | Add another line item for sandwiches with the default price. | |
| | Delete the sandwich line item from the bundle and add a new line item for all the sandwiches with the default price. | |

Reference: https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/pricing-product-bundles

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QUESTION 5

HOTSPOT

You need to configure the credit and reference screening playbook to meet the requirements.

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

NOTE: Each correct selection is worth one point.

Hot Area:

Answer Area

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

Correct Answer:



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Answer Area

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

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

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