

**MB-210.35q**

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**MB-210**



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**Microsoft Dynamics 365 for Sales**

**Sections**

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

### Exam A

#### QUESTION 1

**Note:** This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

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

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

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

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

Does the solution meet the goal?

- A. Yes
- B. No



**Correct Answer:** A

**Section:** Perform Configuration

**Explanation**

**Explanation/Reference:**

#### QUESTION 2

**Note:** This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

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

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

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

Solution: Change the currency code and symbol so that both are displayed.



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the solution meet the goal?

- A. Yes
- B. No

**Correct Answer: B**

**Section: Perform Configuration**

**Explanation**

**Explanation/Reference:**



### QUESTION 3

**Note:** This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

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

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

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

Solution: Change the default currency.

Does the solution meet the goal?

- A. Yes

B. No

**Correct Answer: B**

**Section: Perform Configuration**

**Explanation**

**Explanation/Reference:**

**QUESTION 4**

You work for a company using Dynamics 365 for Sales.

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

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

What should you do?

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



**Correct Answer: B**

**Section: Perform Configuration**

**Explanation**

**Explanation/Reference:**

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

**QUESTION 5**

**DRAG DROP**

You manage the Dynamics 365 environment for Contoso, Ltd. A rule automatically creates a lead associated with an email when an email is sent to sales@contoso.com.

You need to ensure that the marketing manager receives an email each time an email request is sent to sales@contoso.com.

How should you configure the rule? To answer, drag the appropriate actions to the correct requirements. 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.

**Select and Place:**

Actions	Requirement	Action
Create a business process flow	Create an email.	Action
Create a child workflow	Send the email.	Action
Create a real-time workflow		

**Correct Answer:**

Actions	Requirement	Action
Create a business process flow	Create an email.	Create a real-time workflow
	Send the email.	Create a child workflow

**Section: Perform Configuration**

**Explanation**

**Explanation/Reference:**

Explanation:

**QUESTION 6**

You are a Dynamics 365 administrator.

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

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

What should you change?

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

**Correct Answer: A**

**Section: Perform Configuration**

**Explanation**

**Explanation/Reference:**

#### **QUESTION 7**

You are Dynamics 365 for Sales administrator.



Sales representatives must enter estimated revenue only as an exception.

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

What should you do?

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

**Correct Answer: D**

**Section: Perform Configuration**

**Explanation**

**Explanation/Reference:**

**QUESTION 8**

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

You need to create an interactive dashboard.

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

**NOTE:** Each correct selection is worth one point.

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

**Correct Answer:** ACD

**Section:** Perform Configuration

**Explanation**

**Explanation/Reference:**

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

**QUESTION 9**

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

You need to ensure that currency values are accurately reported.

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

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

**Correct Answer:** A

**Section:** Perform Configuration

**Explanation**

**Explanation/Reference:**

**QUESTION 10**

An organization uses sales dashboards in Dynamics 365.

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

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

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

**NOTE:** Each correct selection is worth one point.

- A. Add the external data as virtual entities in Dynamics 365 and use it for the dashboard visualizations.
- B. Create all visuals in a Microsoft Power BI dashboard. Embed the dashboard in Dynamics 365.
- C. Create tiles and a dashboard in Microsoft Power BI.
- D. Create charts with required data in Dynamics 365.
- E. Combine Microsoft Power BI and standard charts on a standard dashboard in Dynamics 365.

**Correct Answer:** ABE

**Section:** Perform Configuration

**Explanation**

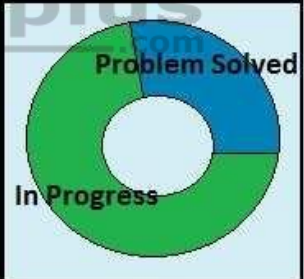
**Explanation/Reference:**

**QUESTION 11**

HOTSPOT

You run an Account Overview report for Fourth Coffee. The following results are displayed.



Account Overview as of:		11/13/2018	Status	Acct#												
<b>Fourth Coffee (sample)</b>			Active	ABSS4G45												
<b>Basic Profile</b> Parent Account: Relationship: Industry: Location: Renton, Tx Category: Website: <a href="http://www.fourthcoffee.com/">http://www.fourthcoffee.com/</a> Ownership: Ticker Symbol:		<b>Opportunity Summary</b> <u>Active opportunities by probability</u> <u>All opportunities by current state</u> No Data   No Data  <table border="1"> <thead> <tr> <th><u>Active Opportunities</u></th> <th><u>Amount</u></th> <th><u>Prob</u></th> <th><u>Weighted</u></th> </tr> </thead> <tbody> <tr> <td>Other</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Total</td> <td></td> <td>0</td> <td></td> </tr> </tbody> </table>			<u>Active Opportunities</u>	<u>Amount</u>	<u>Prob</u>	<u>Weighted</u>	Other				Total		0	
<u>Active Opportunities</u>	<u>Amount</u>	<u>Prob</u>	<u>Weighted</u>													
Other																
Total		0														
<b>Primary Contact</b> <b>Yvonne McKay (sample)</b> Title: Purchasing Manager Location: Redmond, WA Business Phone: 555-0100 Mobile Phone: Home Phone: Fax: Pager: Email: someone_a@example.com		<b>Service Summary</b> <u>Satisfaction (all closed cases)</u> <u>Status Reason (all cases)</u> <div>  </div>														
<b>Additional Contacts</b> Yvonne McKay (sample) - Purchasing Manager - (555-0100)																

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.

**Hot Area:**

## Answer Area

### Question

Why is the satisfaction area blank?

### Answer choice

	▼
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	

Correct Answer:



## Answer Area

### Question

Why is the satisfaction area blank?

### Answer choice

	▼
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	

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

Explanation:

**QUESTION 12**

You are an administrator for Dynamics 365 for Sales.

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

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

**NOTE:** Each correct selection is worth one point.

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

**Correct Answer:** CD

**Section: Perform Configuration****Explanation**

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

**QUESTION 13**

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

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

Which security role can you use?

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

**Correct Answer:** C

**Section:** Perform Configuration

**Explanation**

**Explanation/Reference:**

**QUESTION 14**

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

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

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

Which entity should you use?

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



**Correct Answer:** B

**Section:** Perform Configuration

**Explanation**

**Explanation/Reference:**

**QUESTION 15**

An organization uses Dynamics 365 for Sales.

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

What should you do?

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

**Correct Answer:** C

**Section:** Perform Configuration

**Explanation**

**Explanation/Reference:**

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

#### **QUESTION 16**

**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: When closing an opportunity, use the Close as Won dialog.

Does the solution meet the goal?

A. Yes

B. No

**Correct Answer:** B

**Section:** Perform Configuration

**Explanation**

**Explanation/Reference:**

#### **QUESTION 17**

**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

**Correct Answer: A**

**Section: Perform Configuration**

**Explanation**

**Explanation/Reference:**

#### QUESTION 18

**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: Change the opportunity to an inactive state.

Does the solution meet the goal?

A. Yes

B. No

**Correct Answer: B**

**Section: Perform Configuration**

**Explanation**

**Explanation/Reference:**

**QUESTION 19**

You work for a company using Dynamics 365 for Sales.

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

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

What should you do?

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

**Correct Answer: A**

**Section: Perform Configuration**

**Explanation**

**Explanation/Reference:**

References:

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

**QUESTION 20**

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.





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option is possible?

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

**Correct Answer:** D

**Section:** Manage Core Sales Identities

**Explanation**



**Explanation/Reference:**

### QUESTION 21

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

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

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

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

**NOTE:** Each correct selection is worth one point.

- A. The opportunity has other quotes in the won status.
- B. The opportunity has other quotes in the draft status.



- C. The opportunity has other quotes in the active status.
- D. The opportunity has other quotes in the revised status reason.

**Correct Answer:** AB

**Section:** Manage Core Sales Identities

**Explanation**

**Explanation/Reference:**

#### QUESTION 22

A company uses Dynamics 365 for Sales.

You must track a competitor to help your company win a sale.

You need to associate the competitor with a Dynamics 365 entity.

To which type of entity can you associate the competitor?

- A. Opportunity
- B. Lead
- C. Account
- D. Contacts



**Correct Answer:** A

**Section:** Manage Core Sales Identities

**Explanation**

**Explanation/Reference:**

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

#### QUESTION 23

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

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

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

What should you do?

- A. Share the record with User2
- B. Grant User2 the stakeholder role
- C. Grant User2 the security role
- D. Instruct User2 to follow the record

**Correct Answer:** A

**Section:** Manage Core Sales Identities

**Explanation**

**Explanation/Reference:**

References:

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

**QUESTION 24 HOTSPOT**

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.

**Hot Area:**

### Answer Area

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

**Correct Answer:**

## Answer Area

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

**Section: Manage Core Sales Identities**

**Explanation**

**Explanation/Reference:**

Explanation:



### QUESTION 25

You manage Dynamics 365 environments for client organizations.

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

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

Which field should you configure?

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

**Correct Answer: A**

**Section: Manage Core Sales Identities**

**Explanation**

**Explanation/Reference:****QUESTION 26**

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 security role
- C. Instruct User2 to follow the record
- D. Add User2 to the Sales team

**Correct Answer: A**

**Section: Manage Core Sales Identities**

**Explanation**

**Explanation/Reference:**

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

**QUESTION 27**

You are a salesperson using Dynamics 365 for Sales.

You need to revise an active quote.

What happens to the original quote record?

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

**Correct Answer: C**

**Section: Manage Sales Entities**

**Explanation**

**Explanation/Reference:**

**QUESTION 28**

You are a Dynamics 365 for Sales administrator.

The sales team is having difficulty locating related products.

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

What should you use?

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

**Correct Answer: A**

**Section: Manage Sales Entities**

**Explanation**

**Explanation/Reference:**

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

**QUESTION 29**

You are a salesperson using Dynamics 365 for Sales.

You need to be able to modify the product price on an active invoice that uses current pricing.

What should you do?

- A. Set the Invoice Product to **Override Price**
- B. Set an End Date for the Price List to ensure the Price List is expired
- C. Set an End Date for the Price List to ensure the Price List is not expired
- D. Set the Invoice Product to **Use Default**

**Correct Answer: A**

**Section: Manage Sales Entities**

**Explanation**

**Explanation/Reference:**

**QUESTION 30**

A company uses Dynamics 365 for Sales.

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

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

What should you do?

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

**Correct Answer: B**

**Section: Manage Sales Entities**

**Explanation**

**Explanation/Reference:**

**QUESTION 31**

You are a Dynamics 365 system customizer. You create a price list with related products. Sales team members use the list to generate opportunities, quotes, and orders.

You need to create a product family.

What should you do?

- A. Add a new product family to an existing product family
- B. Delete the existing price list and create a new one
- C. Create a unit group for use with the product family
- D. Add a parent product family to an existing product family

**Correct Answer: A**

**Section: Manage Sales Entities**

**Explanation**

**Explanation/Reference:**

References: <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/sales-enterprise/create-product-family>

**QUESTION 32**

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

**Correct Answer:** AD

**Section:** Manage Sales Entities

**Explanation**

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

**QUESTION 33**

You are a Dynamics 365 for Sales administrator. You are setting up a product catalog.

You need to configure the base unit group.

Which quantity or measurement should you configure?

- A. the highest needed to sell the product or service
- B. the least frequently used to sell the service
- C. the most frequently used to sell the service
- D. the lowest needed to sell the product or service



**Correct Answer:** D

**Section:** Manage Sales Entities

**Explanation**

**Explanation/Reference:**

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

#### QUESTION 34

**Note:** This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

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

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

The customer is now ready to complete the purchase.

You need to create a quote from the opportunity.

Solution: Convert the Opportunity to a quote.

Does the solution meet the goal?

A. Yes

B. No

**Correct Answer:** A

**Section:** Manage Sales Entities

**Explanation**

**Explanation/Reference:**

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

#### QUESTION 35

**Note:** This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

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





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

The customer is now ready to complete the purchase.

You need to create a quote from the opportunity.

Solution: Qualify the opportunity.

Does the solution meet the goal?

A. Yes

B. No

**Correct Answer: B**

**Section: Manage Sales Entities**

**Explanation**

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



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