Microsoft

MB-210

Microsoft Dynamics 365 for Sales

QUESTION & ANSWERS

QUESTION 1

Case Study	Number of Questions	Total Question
Case Study: 1	13	1 – 13
Case Study: 2	8	14– 21
Case Study: 3	12	22 - 33
Case Study: 4	147	34 - 180
	Total	180

Case Study: 1

Bellows College

Overview

Requirements

Overview

Background

Bellows College has several spots teams. Sporting events take place throughout the year. Processes for managing and selling tickets to events are very outdated. The college uses Microsoft Excel to track who has paid for each private box seat for each season. The college uses a paper-based system to manage individual ticket sales. Bellows often loses money on ticket sales due to lack of accurate purchasing information.

The college currently does not support ticket sales on the day of a sporting event All tickets must be purchased in advance.

Bellows College plans to streamline processes for selling tickets to sporting events. The organization needs an updated system that will support internal sales people and track ail ticket sales for a season.

Sales team

Bellows College has inside phone sales representatives and regional sales representatives that are assigned to specific sales territories. inside phones sales representatives primarily handle individual cash or credit card ticket sales- Regional sales representatives primarily handle group and private box sales. Phone inquiries for group and private box sales are entered into the system and assigned to the appropriate regional representative.

Dynamics 365

Bellows College has purchased Microsoft Dynamics 365 Sales to help manage their ticket sales. You are hired to configure the system to meet the college s needs.

The college has identified the following requirements for the new system:

* Enforce repeatable steps to promote and increase efficiency and consistency for ticket sales across all sports and venues.

* Calculate sales margins based on base ticket prices with discounts for group and alumni sales.

* Maximize private box sales.

* Provide visibility into all potential and pending sales.

* Track and report follow up activities performed by all sales representatives.

Current processes

Ticket sales

Ticket sales are completed and displayed based on the college s fiscal year which begins July 1 and ends June 30.

Ticket sales tor existing customers will be entered as new opportunities for tracking and reporting purposes. To facilitate timely follow-up (end sales representative accountability), a phone can activity will be auto-generated every time a new opportunity is created.

Ticket sales feu new customers will be entered in the solution as leads. Leads will have the following statuses: Open Qualified, and Disqualified. Status values cannot be customized. Status reasons can be customized.

Ticket prices

The standard ticket price for all sporting events is 550. Non-alumni whet purchases are priced based on the standard rate. Alumni ticket purchases ate priced at the current cost. This season the current cost is $35 per ticket. All sports are priced on a markup, except for football. Football is priced based on a hard profit. The college has the following markup and margin policies for the three categories of ticket purchasers:

Purchaser	Markup	Margin
Alumni	10 percent	5 percent
Student	0 percent	0 percent
Non-alumni	0 percent	12 percent

Ticket package discounts are available for group purchases. The following table shows pricing:

# of Tickets for Group	Discount price/ticket
Alumni – 10	$33
Alumni – 20	$31
Alumni > 20	$30
Non-alumni – 10	$48
Non-alumni – 20	$45
Non-alumni > 20	$43

Private box seats

Because of the limited number of private box seats, private box seats sell out quickly. These seats are offered to current renters first then alumni. Remaining box seat tickets are made available to others from year to year. The dean of the college has expressed the desire to personally call the CEOs or primary decision makers of groups to thank them for renewing their private box rentals.

Private box sales for existing customers win be entered as opportunities and converted to orders when finalized. Private box and group sales for new customers will be entered as leads and will follow a standardized sales process. To support reporting, pending new customer sales will go through a verification process using the stages New, Pending Approval. Approved.

Requirements

Accounting

Budgets and taxes must be tracked over an annual accounting period. The name of the accounting period must be displayed based upon the July 1 date. The accounting period must support abbreviations and must be divisible into four quarters.

Invoices must Include:

* Price List Products: Products tied to a price list

* Non-catalog Products: Existing products not part of the product catalog

* Opportunity Products: Products from a previously created opportunity

* Product prices on the invoice can be changed at the salespersons discretion.

System configuration

The system must be set up as follows:

* Individual cash and credit cards sales will be entered as orders in the system.

* New opportunities will automatically generate a required phone call activity for the assigned sales representative to be completed within 5 days. Valid outcomes of the call will be set to Connected. Left Message, and Wrong Number when

closed.

* Non-renewals of private box rentals should be designated with the following outcomes for tracking and reporting purposes: Not interested. Budget cuts, No Longer in business. Other. It Other is chosen, the sales representative must provide additional information in the provided text box.

Tickets

The ticket manager must be able to create discounts for volume purchases of tickets for either groups or bundles of games.

The ticket manager must be able to calculate the best margins for ticket sales. They need to calculate prices as percentage of costs.

Reporting

The school's athletic director needs a fiscal yea' 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).

All tales reporting must be completed by using Dynamics 365 foe Sales. Bellows College has purchased the online version o' the Sales Content Pack for Power BI to allow for visualizations and the creation of dashboards 'or ticket sales. The sales team needs to use a secured connection to access the Bellows College Power Bi dashboard.

Sales team members need the following report types to meet reporting needs:

Report	Report description
Orders	Provides a view of ticket orders and line items.
Discounts by Number of Employees	Provides a custom report to display discounts provided based upon number of employees within a customer organization.
Standings Report	Provides a report hosted by a third party of current team standings.
Branding Report	Provides images of team logos and fonts. This report never changes.
Mobile Salesperson Report	Provides the ability to create PivotTables for mobile sales team members when connected to a network.

Problem Statements

The sales manager is concerned with the tack of sates from one of the sales representatives in comparison to the other sales representatives- The legacy system does not provide enough data to allow the manage* to give proper feedback or guidance.

The sales manager has received emails from a potential private box customer named Contoso. Ltd. confirming that they have not had any contact from any sales representative even though they are ready to purchase group tickets.

Question: No, 1

You need to configure pricing for the Contoso, Ltd. invoice.
What should you do?

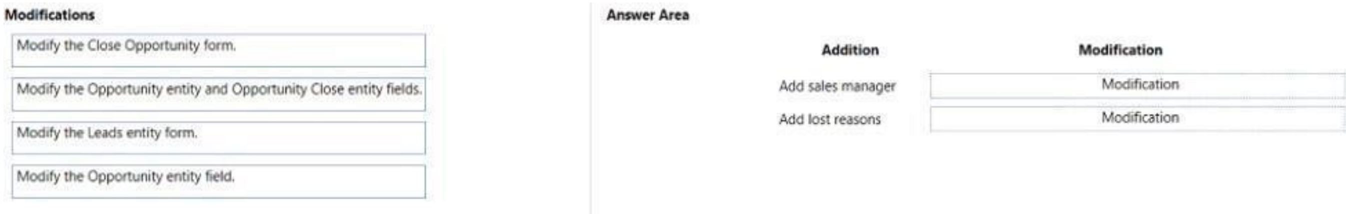
A. Set the Invoice Product to Override Price
B. Set the Invoice Product to Use Default
C. Configure an end date for the price list

Correct Answer: A

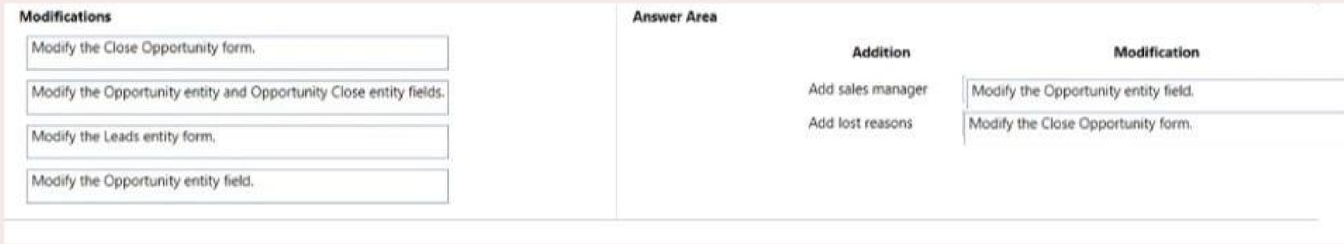
QUESTION 2

You need to determine which configuration changes to make to address closed and lost opportunities. Which modifications should you complete? To answer, drag the appropriate modifications to the correct additions. Each modification 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.



Correct Answer:



QUESTION 3

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

Account Overview as of:	11/13/2018	Status	Acct#
Fourth Coffee (sample)		Active	ABSS4G45

Basic Profile

Parent Account:	
Relationship:	
Industry:	
Location:	Renton, Tx
Category:	
Website:	http://www.fourthcoffee.com/
Ownership:	
Ticker Symbol:	

Opportunity Summary

Active opportunities by probability	All opportunities by current state
No Data	No Data

Active Opportunities	Amount	Prob	Weighted
Other			
Total		0	

Primary Contact

Yvonne McKay (sample)

Title:	Purchasing Manager
Location:	Redmond, WA
Business Phone:	555-0100
Mobile Phone:	
Home Phone:	
Fax:	
Pager:	
Email:	someone_a@example.com

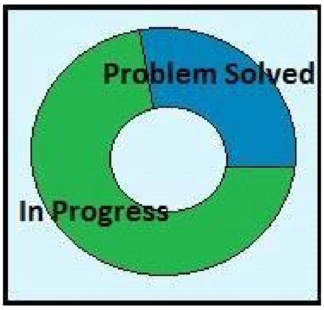
Additional Contacts

Yvonne McKay (sample) - Purchasing Manager - (555-0100)

Service Summary

Satisfaction (all closed cases)

Status Reason (all cases)



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
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

Correct 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

QUESTION 4

You are a salesperson using Dynamics 365 Sales. You need to add a product line item in an opportunity. What should you do first in the opportunity?

A. Configure units.
B. Add a price list.
C. Add a product name. D. Specify revenue.

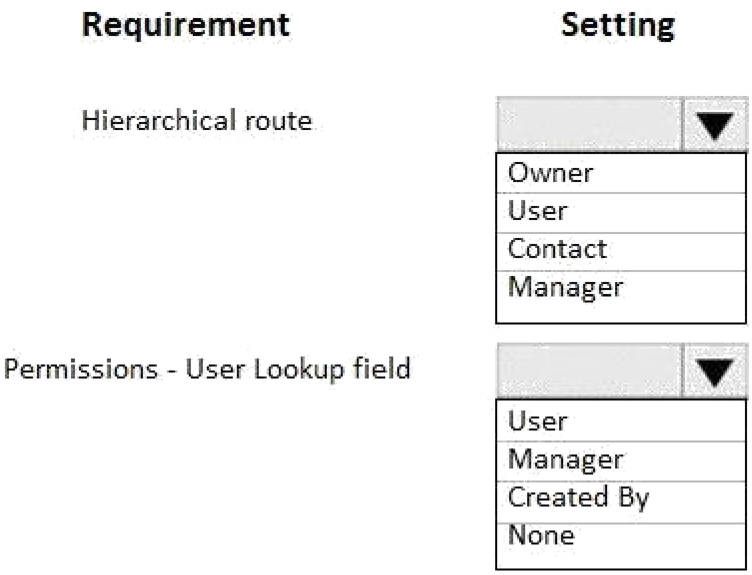
Correct Answer: B

QUESTION 5

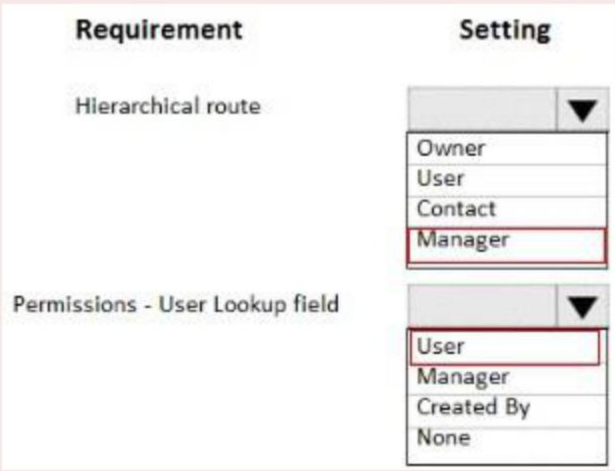
A company wants to implement the Forecast Management feature in Dynamics 365 Sales.

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.



Correct Answer:



Explanation/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

QUESTION 6

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

QUESTION 7

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.

Correct Answer: B

Explanation/Reference:

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

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

Correct Answer: A

Explanation/Reference:

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

QUESTION 9

You are implementing Dynamics 365 Sales for a company that has salespeople in the following cities in the state of Florida: Jacksonville, Miami, and Tamp
a. The manager in Florida oversees the salespeople for all three cities.

You must set up territories by states. Each state must be a parent territory and have a different manager.

Sales information must be shown by city and then by state.

You need to set up territories for Florida.

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

Requirement	Setting
Determine the number of territories.	Four territories and zero sub-territories Two territories and two sub-territories One territory and three sub-territories One territory and four sub-territories
Determine how many territories in which the Jacksonville salespeople should be members.	One territory and one sub-territory: Florida and Jacksonville One sub-territory: Jacksonville Two territories: Florida and Jacksonville One territory: Florida
Determine how many territories the Florida sales manager should manage	One territory and zero sub-territory: Florida One territory and three sub-territories: Florida, Jacksonville, Miami, and Tampa Four territories: Florida, Jacksonville, Miami, and Tampa Zero territories and three sub-territories: Jacksonville, Miami, and Tampa

Correct Answer:

Requirement	Setting
Determine the number of territories.	Four territories and zero sub-territories Two territories and two sub-territories One territory and three sub-territories One territory and four sub-territories
Determine how many territories in which the Jacksonville salespeople should be members.	One territory and one sub-territory: Florida and Jacksonville One sub-territory: Jacksonville Two territories: Florida and Jacksonville One territory: Florida
Determine how many territories the Florida sales manager should manage	One territory and zero sub-territory: Florida One territory and three sub-territories: Florida, Jacksonville, Miami, and Tampa Four territories: Florida, Jacksonville, Miami, and Tampa Zero territories and three sub-territories: Jacksonville, Miami, and Tampa

Explanation/Reference:

https://docs.microsoft.com/en-us/power-platform/admin/set-up-sales-territories-organize-business-markets-geographical-area

QUESTION 10

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?	Case Lead
You qualify a lead. For which entity is a record created?	Contact Case

Correct Answer:

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

QUESTION 11

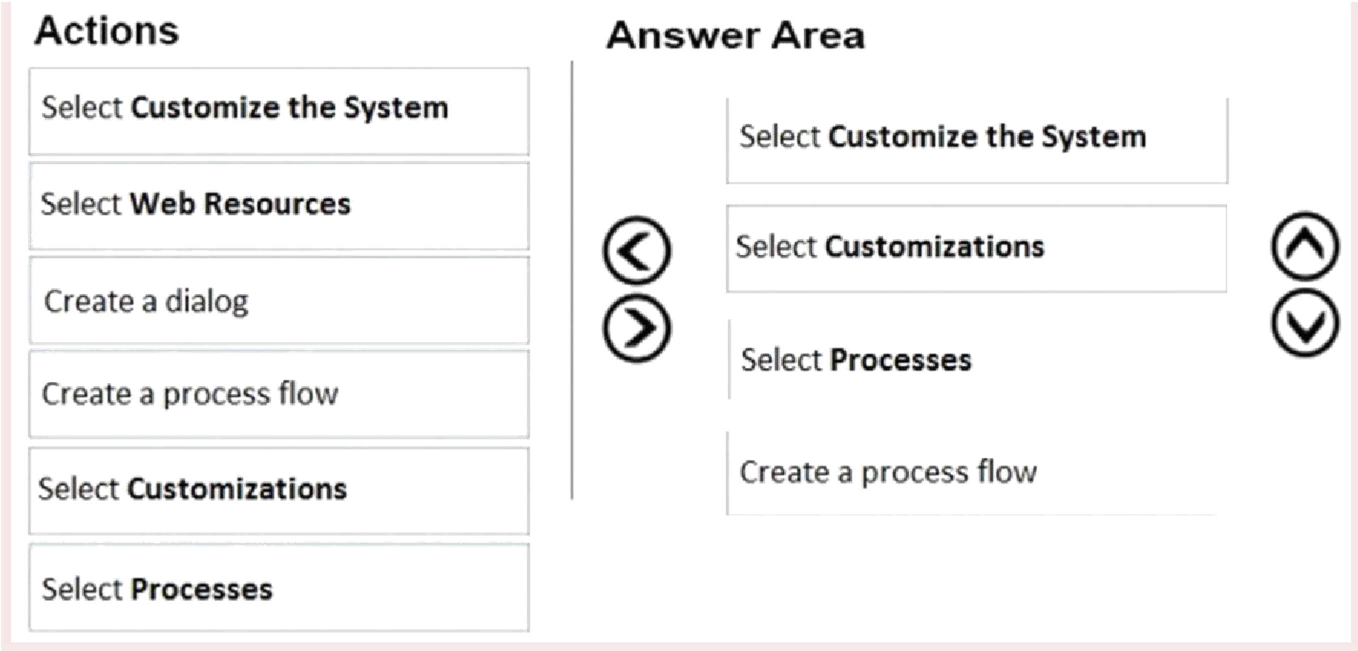
You are configuring Dynamics 365 for Sales. Your organization has a five-stage sales process comprised of leads, opportunities, client validation, quotes, and orders.

You need to ensure that salespeople can move through the sales process and view progress.

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	Answer Area
Select **Customize the System**	
Select **Web Resources**	
Create a dialog	
Create a process flow	
Select **Customizations**	
Select **Processes**	

Correct Answer:



QUESTION 12

You are a Dynamics 365 Sales administrator for an organization.
The organization is no longer going to sell a product in the product catalog.
You need to ensure that the product is no longer available for selection by sales staff. What should you do?

A. Delete the product
B. Edit the name
C. Retire the product

Correct Answer: C

Explanation/Reference:

https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/retire-product

QUESTION 13

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 c complete solution.
NOTE: Each correct selection is worth one point.

A. Queue Item
B. Opportunity
C. Knowledge Article D.
Case

E. Invoice

Correct Answer: A,C,D

Explanation/Reference:

https://docs.microsoft.com/en-us/dynamics365/customer-engagement/customize/configure-interactivedashboards