MB-210 Q&As

Microsoft Dynamics 365 Sales

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QUESTION 1

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:

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:

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.

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

QUESTION 2

You need to choose where to enter the other show names in the system. Where should you add the shows?

A. Competitor

B. Product

C. Accounts

D. Contacts

Correct Answer: A

QUESTION 3

You need to create a price list for loaves of bread. What should you set up?

A. one price list item, one discount list

B. one price list item, three discount lists

C. three price list items, one discount list

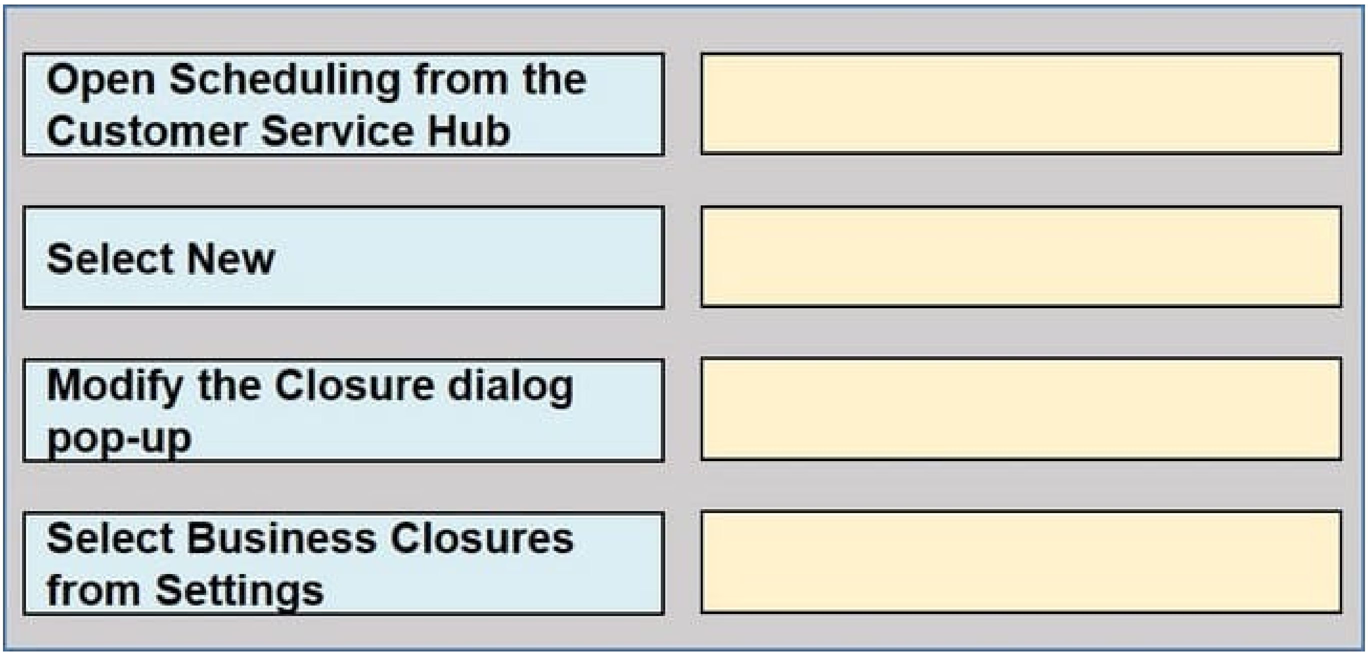
D. three price list items, no discount lists

Correct Answer: C

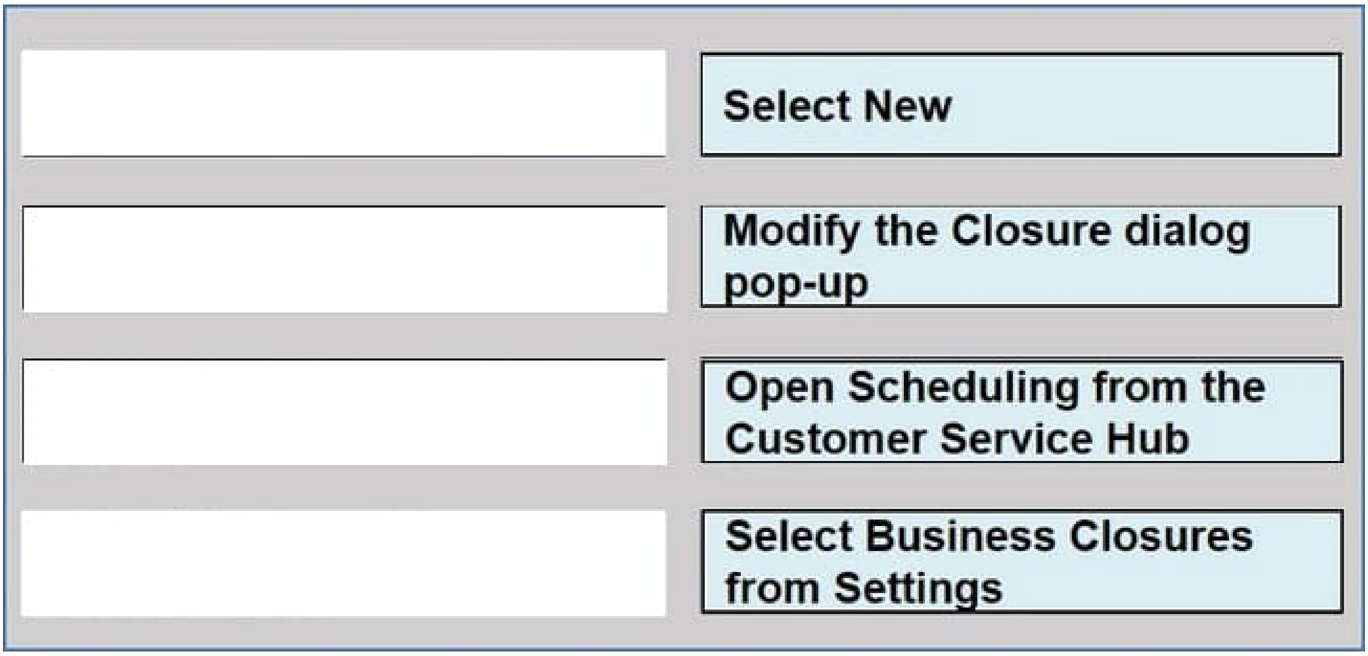
QUESTION 4

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:



Correct Answer:



Schedule a new business closure

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

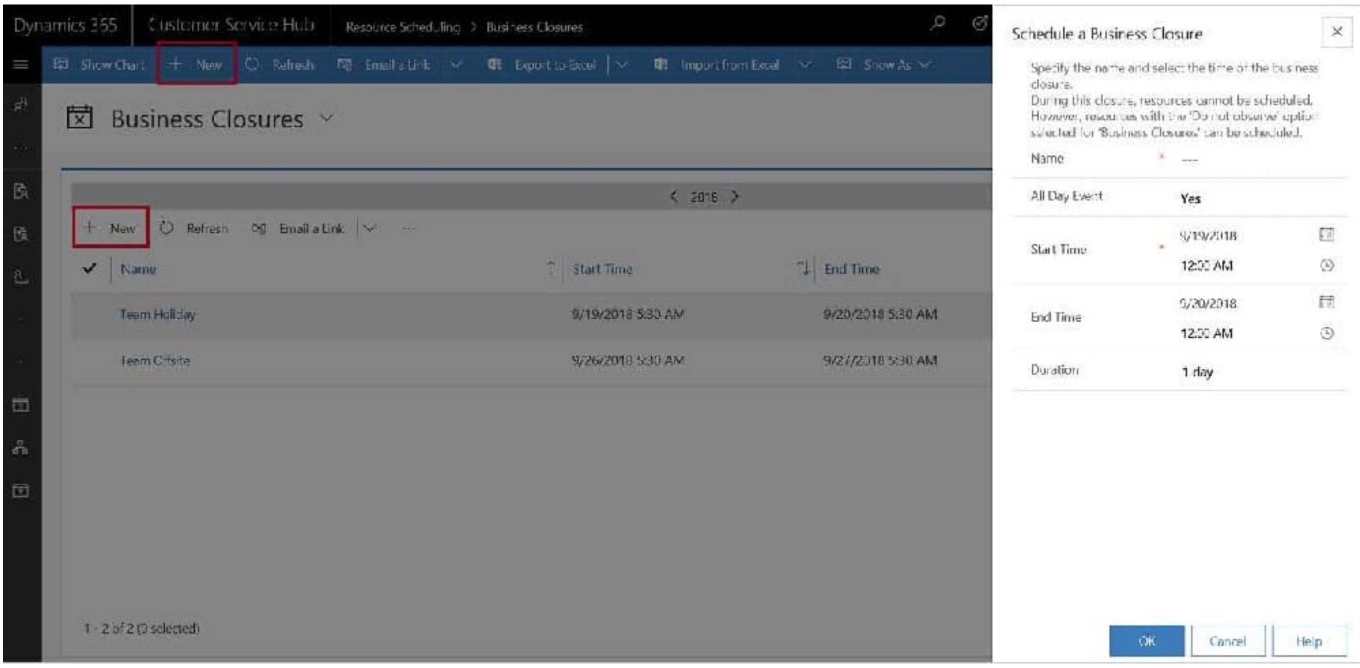
In the Customer Service Hub sitemap, go to Scheduling.

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.

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

QUESTION 5

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. Sales Person

B. Knowledge Manager

C. System Customizer

D. CEO - Business Manager

Correct Answer: D