



# MB-210<sup>Q&As</sup>

Microsoft Dynamics 365 Sales

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### QUESTION 1

#### HOTSPOT

You are converting a lead for the manufacturing manager from Contoso, Ltd. Neither the company nor the manufacturing manager are in your Dynamics 365 system.

You need to ensure that the lead record is correctly converted.

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

NOTE: Each correct selection is worth one point.

Hot Area:

**Which entity records are created?**

	▼
<b>Account, Contact, and Opportunity</b>	
<b>Only Opportunity and Contact</b>	

**What is the lead status?**

	▼
<b>Deleted</b>	
<b>Closed</b>	
<b>Open</b>	

Correct Answer:



Which entity records are created?

<b>Account, Contact, and Opportunity</b>
Only Opportunity and Contact

What is the lead status?

Deleted
Closed
<b>Open</b>

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

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

**QUESTION 2**

**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.	<ul style="list-style-type: none"> <li>Add a Task activity to the playbook.</li> <li>Add the credit screening to the playbook.</li> <li>Add the finance manager as the publisher of the playbook.</li> <li>Add a custom activity for Perform Credit Check and add it to the playbook.</li> </ul>
Ensure that the finance manager has the latest version of the unfavorable screening phone script.	<ul style="list-style-type: none"> <li>Add the script to the phone call activity.</li> <li>Add a phone script to the playbook template.</li> <li>Add the phone script to the Task activity.</li> </ul>
Ensure that playbooks can be initiated from all RFQs.	<ul style="list-style-type: none"> <li>Associate the playbook with the Lead entity only.</li> <li>Associate the playbook with the Opportunity entity only.</li> <li>Associate the playbook with the Lead and Opportunity entities.</li> <li>Associate the playbook with the Quote entity.</li> </ul>
Ensure proper tracking for all tasks associated with playbooks.	<ul style="list-style-type: none"> <li>Set Track Progress to No.</li> <li>Set Track Progress to Yes.</li> <li>Set the estimated duration of the playbook template.</li> <li>Set the estimated duration of the activity.</li> </ul>

Correct Answer:

**Answer Area**

Requirement	Configuration
Ensure that the finance manager performs the credit screening.	<ul style="list-style-type: none"> <li>Add a Task activity to the playbook.</li> <li>Add the credit screening to the playbook.</li> <li>Add the finance manager as the publisher of the playbook.</li> <li>Add a custom activity for Perform Credit Check and add it to the playbook.</li> </ul>
Ensure that the finance manager has the latest version of the unfavorable screening phone script.	<ul style="list-style-type: none"> <li>Add the script to the phone call activity.</li> <li>Add a phone script to the playbook template.</li> <li>Add the phone script to the Task activity.</li> </ul>
Ensure that playbooks can be initiated from all RFQs.	<ul style="list-style-type: none"> <li>Associate the playbook with the Lead entity only.</li> <li>Associate the playbook with the Opportunity entity only.</li> <li>Associate the playbook with the Lead and Opportunity entities.</li> <li>Associate the playbook with the Quote entity.</li> </ul>
Ensure proper tracking for all tasks associated with playbooks.	<ul style="list-style-type: none"> <li>Set Track Progress to No.</li> <li>Set Track Progress to Yes.</li> <li>Set the estimated duration of the playbook template.</li> <li>Set the estimated duration of the activity.</li> </ul>

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

**QUESTION 3**

You need to determine the cause of the issue with desktop users and business cards. What is the cause of the issue?

- A. The field needs to be added to the form
- B. Show image on the form is not selected in Form Properties



- C. The users do not have the appropriate permissions
- D. A business rule needs to be set up to show the field
- E. The AI Builder Business Card control needs to be configured for the field on the form

Correct Answer: B

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#### QUESTION 4

You need to implement dashboards. Which URL should you use?

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

Correct Answer: A

Reference: <https://carldesouza.com/install-power-bi-dynamics-365-content-pack/>

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#### QUESTION 5

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: C

"Make it easier for sales agents to find products and services in a product catalog by creating a product family and classifying similar products in it. A product family lets you group and categorize products, making it easier for you to manage them."

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

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