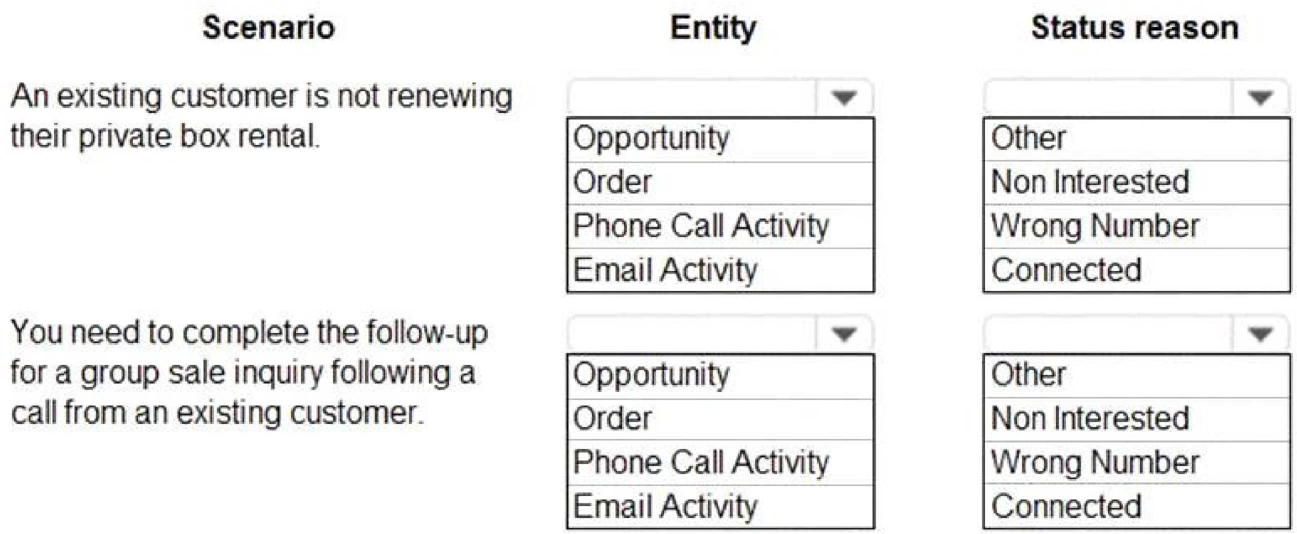
Exam : MB-210

Title : Microsoft Dynamics 365 Sales Functional Consultant

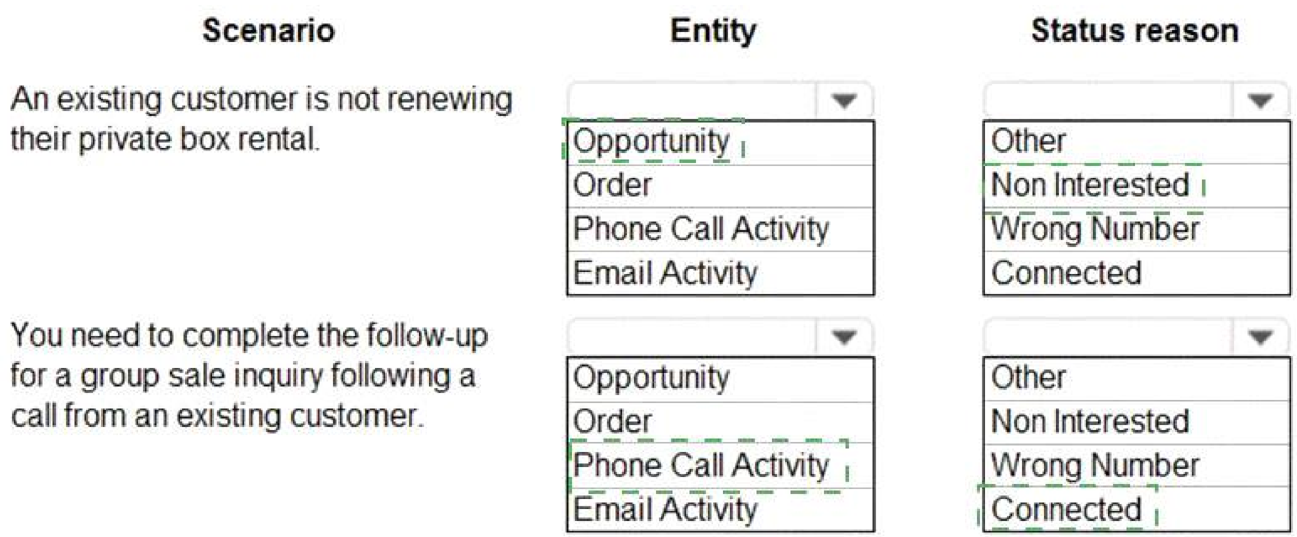
Vendor : Microsoft

Version : DEMO

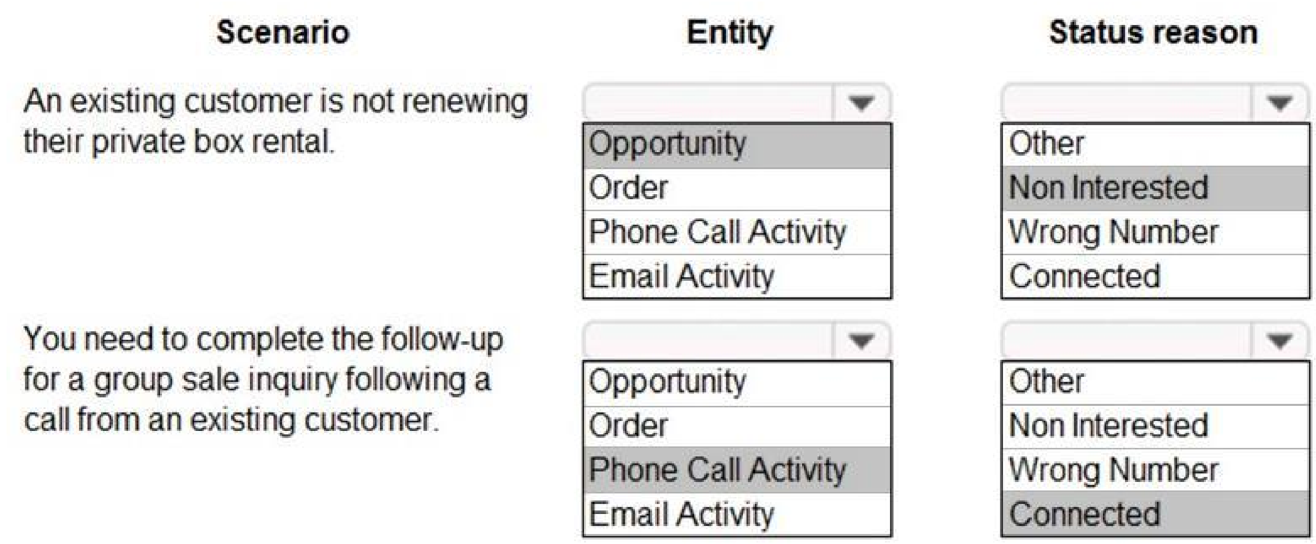
NO.1 You need to configure opportunity status reasons to meet the requirements for existing customer sales.
Which options should you use? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.



Answer:



Explanation:



Topic 1, Bellows College Case Study

This is a case study. Case studies are not timed separately. You can use as much exam time as you would like to complete each case. However, there may be additional case studies and sections on this exam. You must manage your time to ensure that you are able to complete all questions included on this exam in the time provided.

lo answer the questions included in a case study, you will need to reference information that is provided in the case study. Case studies might contain exhibits and other resources that provide more information about the scenario that is described in the case study. Each question is independent of the other questions in this case study.

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To start the case study

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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 Processes for managing and selling tickets to events are very outdated.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.

NO.2 You need to create invoices for all customers.

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

NOTE: Each correct selection is worth one point.

Products

Price List Product

Non-catalog Product

Opportunity Product

Answer Area

Option	Product
Existing product	product
Write-in product	product
Get product	product

Answer:

Products

Price List Product

Non-catalog Product

Opportunity Product

Answer Area

Option	Product
Existing product	Price List Product
Write-in product	Non-catalog Product
Get product	Opportunity Product

Explanation:

Option	Product
Existing product	Price List Product
Write-in product	Non-catalog Product
Get product	Opportunity Product

NO.3 You need to configure accounting options.
Which options should you use? To answer, drag the appropriate options to the correct tasks. Each option 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.

Options

- Fiscal Year settings
- Display As
- Name Based On
- Fiscal Period template

Answer Area

Task	Option
Configure the accounting period.	option
Automatically configure accounting period names according to date.	option
Configure fiscal year abbreviations.	option
Configure how accounting years are divided.	option

Answer:

Options

- Fiscal Year settings
- Display As
- Name Based On
- Fiscal Period template

Answer Area

Task	Option
Configure the accounting period.	Fiscal Year settings
Automatically configure accounting period names according to date.	Name Based On
Configure fiscal year abbreviations.	Display As
Configure how accounting years are divided.	Fiscal Period template

Explanation:

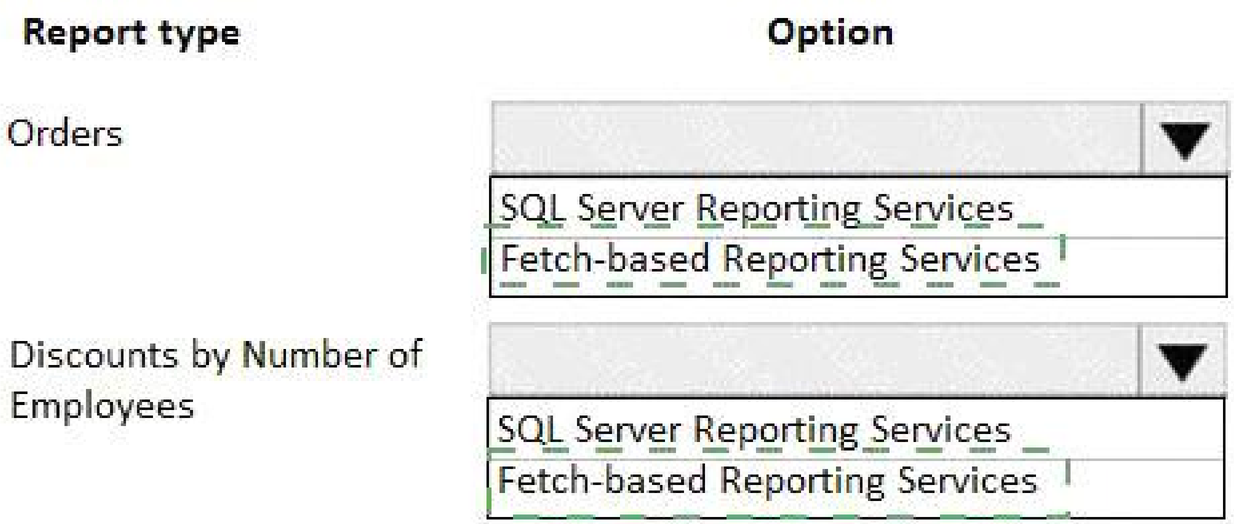
Task	Option
Configure the accounting period.	Fiscal Year settings
Automatically configure accounting period names according to date.	Name Based On
Configure fiscal year abbreviations.	Display As
Configure how accounting years are divided.	Fiscal Period template

Reference:
https://docs.microsoft.com/en-us/power-platform/admin/work-fiscal-year-settings

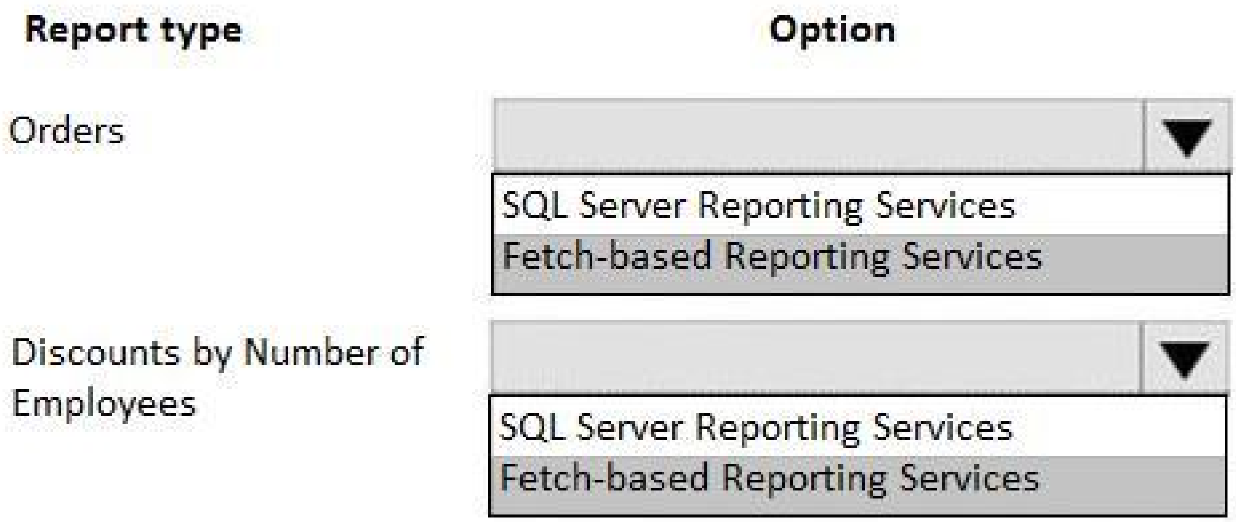
NO.4 You need to create and configure access to the Orders report and the Discounts by Number of Employees report.
What should you use? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Report type	Option
Orders	SQL Server Reporting Services Fetch-based Reporting Services
Discounts by Number of Employees	SQL Server Reporting Services Fetch-based Reporting Services

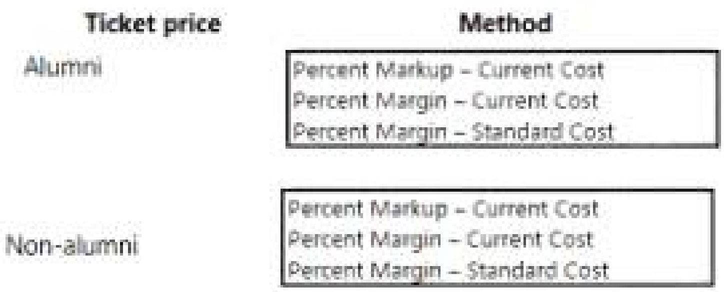
Answer:



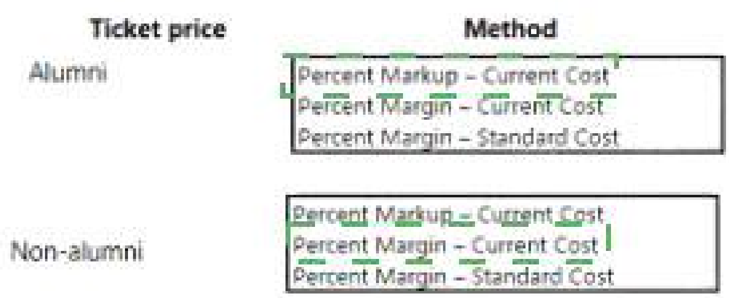
Explanation:



NO.5 You need to create a discount list for ticket sales.
Which pricing methods should you use? To answer, select the appropriate method in the dialog box in the answer area.
NOTE: Each correct selection is worth one point.



Answer:



Explanation:

NO.6 You need to configure a phone call activity for the dean.
To which value should you set the value of the Call With field?

A. contact name
B. stakeholder
C. record owner
D. dean

Answer: A

Reference:
https://docs.microsoft.com/en-us/dynamics365/customerengagement/on-premises/basics/add-phone-call-task- email-appointment-activity-case-record

NO.7 You need to implement dashboards.
Which URL should you use?

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

Answer: A

NO.8 You need to identify new customer pending sales.
What should you do?

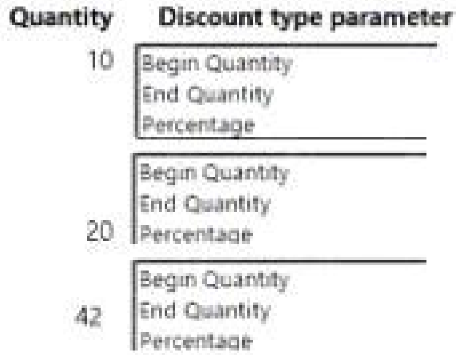
A. Create status reasons in the solution and associate them with Open status
B. Add statuses for all the pending sales stages
C. Set all new leads to a default status of Qualified
D. Configure the solution to automatically convert leads to opportunities

Answer: A

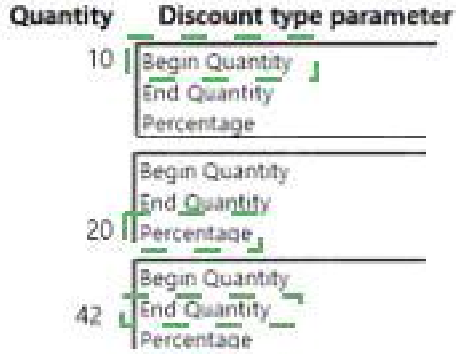
Explanation:
To support reporting, pending new customer sales will go through a verification process using the stages New, Pending Approval, Approved.

NO.9 You need to configure group sales discounts for alumni.

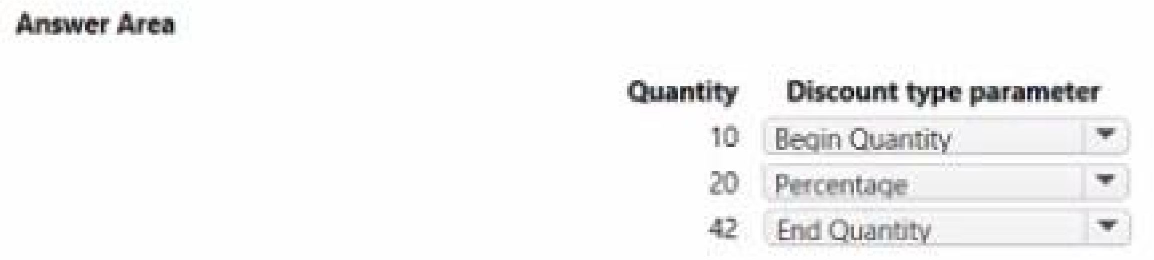
Which discount type parameters should you use? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.



Answer:



Explanation:



NO.10 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
Answer: A

NO.11 You need to resolve the sales manager's issue regarding private box customers.
What should you do?
A. Convert all incoming phone calls to leads.
B. Convert the sales manager's emails lo opportunities.

C. Convert the sales manager's emails to leads.
D. Convert the dean's phone call to an opportunity.
Answer: A

NO.12 You need to increase efficiency and consistency for ticket sales to meet company requirements.
What should you create?
A. a Microsoft Flow workflow
B. a playbook
C. a Lifecycle Services (LCS) package
Answer: B
Explanation:
Enforce repeatable steps to promote and increase efficiency and consistency for ticket sales across all sports and venues.
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/enforce-best-practices-playbooks

NO.13 You need to create a chart for the athletic director.
What should you do?
A. Use purchaser, markup, and margin on the X-axis. Use amount of sales on the Y-axis.
B. Use the ticket type as the X-axis. Use amount of sales on the Y-axis
C. Use the ticket type on the X-axis. Use margins multiplied by cost on Y-axis
D. Use discount price on the X-axis. Use the number of tickets for groups on the Y-axis.
Answer: B
Explanation:
The school's athletic director needs a fiscal year 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).
Topic 2, Humongous insurance Case Study
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Background
Humongous insurance provides fleet automotive insurance. The company s accounting year is July 1st-June
31st.
They have experienced rapid growth by acquiring brokerages that have locations in Canada, the United States, and the United Kingdom.
The company is making a big push for the Start of their second quarter on October 1st.
Current environment
* United States salespeople ate located in either the north, east south, west or national territory.
* Only national territory sales team members can send quotes and Invoices across multiple territories.
* Sales managers route leads based on territory.
* Salesperson! and Salesperson2 are part of the south region and the national account respectively.
* Salespeople cannot accurately report progression of sales and whether they are closed or still in process.
* Manager and underwriter approval is communicated by email.
* Many salespeople use different quote layouts.
Requirements
Territories
* Each territory must be set up as a Business Unit for security.
* Each territory must have the ability to qualify its own leads.
Security
* National sales team members must have privileges in order to see sales and account Information managed by the regional sales teams.
* Configure appropriate security for national and each regional sales.
Goals
* Salespeople's goals must roll up to their manager's goal.
* Goal mettles need lo automatically calculate every 12 hours.
Quotes
* Set up version traceability for quotes.
* Quotes must be marked with the word "Final' when approved.
* Quotes and orders must be generated in their clients" currency.
* Quotes and invoices must be able to be viewed across a variety of devices.
* Pricing must be standardized for insurance products while supporting tiered pricing across national and regional accounts.
Opportunities
* Closed opportunities that are won or lost must capture competitor information. The company wants a visualization built 'or the categories related to why the opportunities closed a certain way.
* When an opportunity is nearing time to quote, products should be added to the opportunity.
Other Requirements
* Simplify data entry and reduce dual data entry.
* Help salespeople and their managers keep track of where they are in the sales process.
* Use out-of-the-box reports where possible.
* Generate invoice numbers automatically.

* Begin invoice numbers with the letters INV.
* Allow managers to be able to view a diagram and dull down to leads converted in the last 30 days.

Issues

* Salespeople cannot identify the sales process stage process for each customer.
* Updated products are not easily updated within the product groups.
* There is no pricing tool.
* Salespeople must research each product every time they have to Quote a customer on a product
* UserA is unable to quality leads.
* The manager follows the process on an approved quote but an error occurs.
* ClientA purchases products from multiple regions for a single order.
* Not all products are available in regional pricelists or national pricelists.

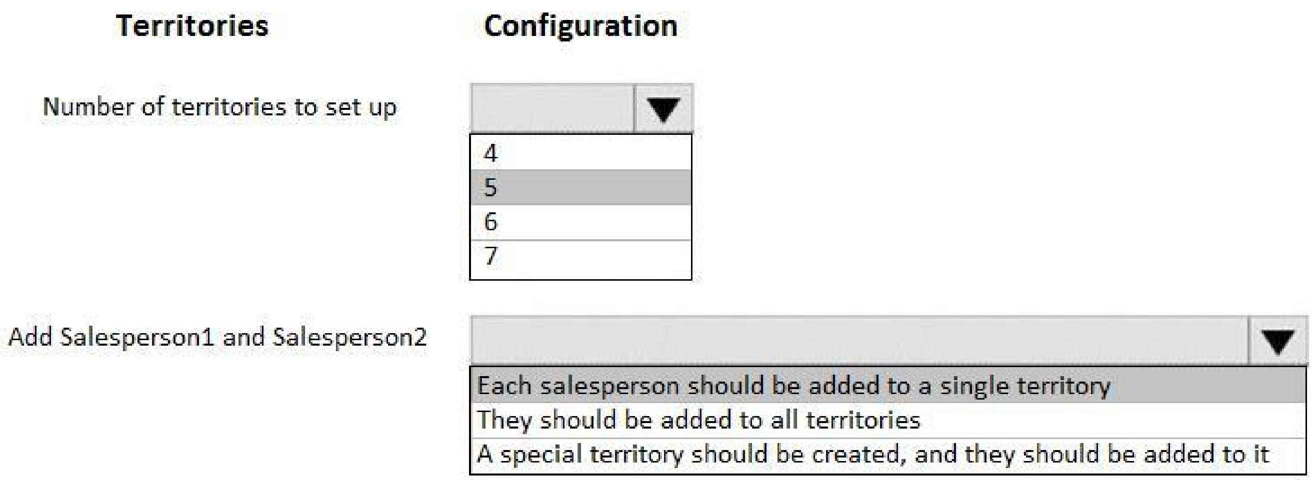
NO.14 You need to configure territories and membership.
Which configurations should you use? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Territories	Configuration
Number of territories to set up	4 5 6 7
Add Salesperson1 and Salesperson2	Each salesperson should be added to a single territory They should be added to all territories A special territory should be created, and they should be added to it

Answer:

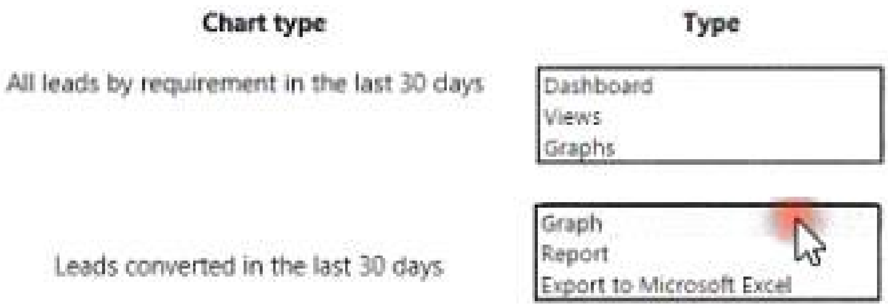
Territories	Configuration
Number of territories to set up	4 5 6 7
Add Salesperson1 and Salesperson2	Each salesperson should be added to a single territory They should be added to all territories A special territory should be created, and they should be added to it

Explanation:



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

NO.15 You need to create visualizations for managers.
What should you configure? To answer, select the appropriate options In the answer area.
NOTE: Each correct selection is worth one point.



Answer:

Explanation:
Graphical user interface, application Description automatically generated with medium confidence

Chart type	Type
All leads by requirements in the last 30 days.	Dashboard Views Graphs
Leads converted in the last 30 days.	Graph Report Export to Microsoft Excel

NO.16 You need to configure the system for incoming email to support creation of leads from email requirements.
What should you do? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Requirement	Action
Create leads from incoming emails	Create a Queue and Record Creation Rule Create a Workflow for incoming emails Create an Action to trigger a plug-in
Do not create contacts from emails from unknown senders	Disable Create records for emails from unknown senders Enable duplicate detection rules for emails Disable duplicate detection rules for leads Enable Create Lead in email tracking

Answer:

Requirement	Action
Create leads from incoming emails	Create a Queue and Record Creation Rule Create a Workflow for incoming emails Create an Action to trigger a plug-in
Do not create contacts from emails from unknown senders	Disable Create records for emails from unknown senders Enable duplicate detection rules for emails Disable duplicate detection rules for leads Enable Create Lead in email tracking

Explanation:

Requirement	Action
Create leads from incoming emails	Create a Queue and Record Creation Rule Create a Workflow for incoming emails Create an Action to trigger a plug-in
Do not create contacts from emails from unknown senders	Disable Create records for emails from unknown senders Enable duplicate detection rules for emails Disable duplicate detection rules for leads Enable Create Lead in email tracking

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

NO.17 You need to determine which fields are required when opportunities are marked as lost.
Which fields are required?
A. Status and Stakeholders
B. Status and Contact
C. Status Reason and Competitor
D. Status Reason and Description
Answer: C

NO.18 You need to resolve the issue UserA is experiencing.
Where should you add UserA?
A. Team
B. Field Security Profile
C. Office 365 group
D. Business Unit
Answer: D

NO.19 You need to set up quotes to meet the requirements.
How should you configure the quotes? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Requirement	Configuration
Send quotes in a read-only format	Use PDF Use XML Use RTF Use CSV
Create a standardized quote that can be re-used	Create a Word template Create a Fetch XML report Create a PowerBI app

Answer:

Requirement	Configuration
Send quotes in a read-only format	Use PDF Use XML Use RTF Use CSV
Create a standardized quote that can be re-used	Create a Word template Create a Fetch XML report Create a PowerBI app

Explanation:

Answer Area

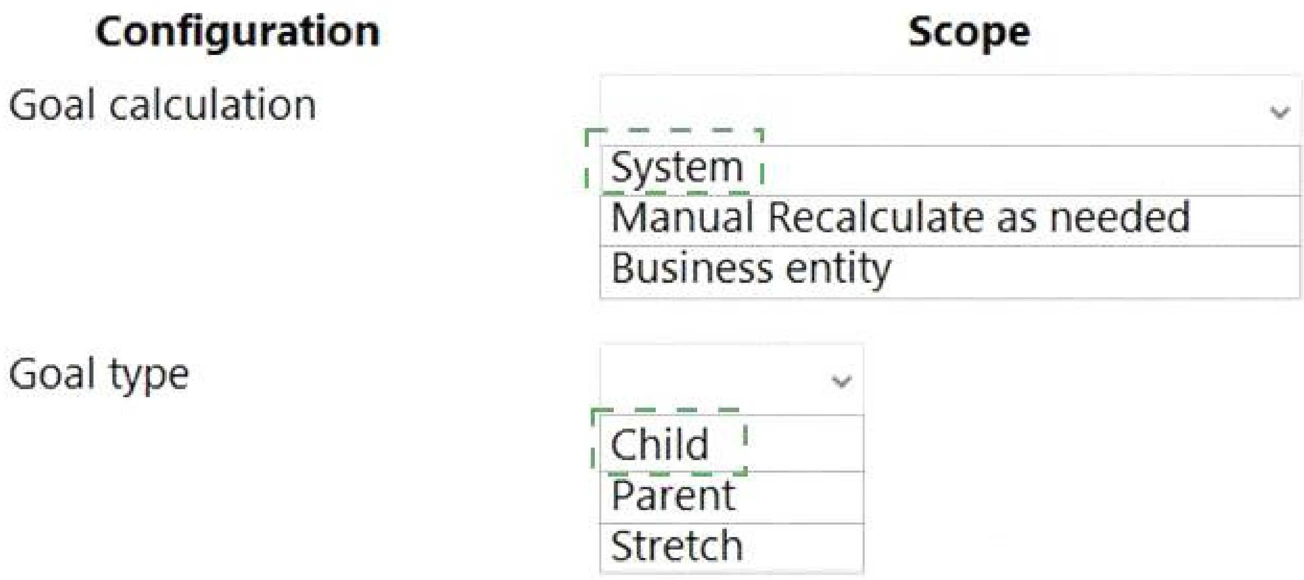
Requirement	Configuration
Send quotes in a read-only format	Use PDF
Create a standardized quote that can be re-used	Create a Word template

Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/create-quote-pdf

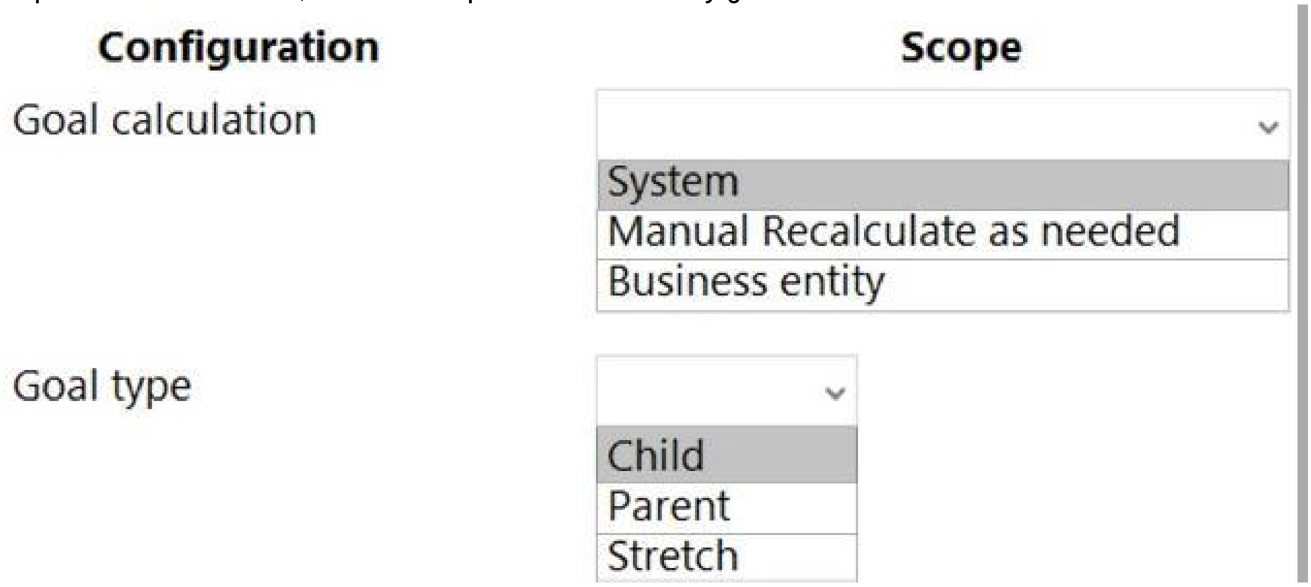
NO.20 You need to set up goals for the salespeople.
How should you set up the configurations? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Configuration	Scope
Goal calculation	System Manual Recalculate as needed Business entity
Goal type	Child Parent Stretch

Answer:



Explanation:
Graphical user interface, table Description automatically generated



Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/goals-overview

NO.21 You need to determine how notes and attachments are handled in converted leads.
How are they handled?

A. moved to the account after the lead is qualified

B. deleted after the lead is qualified

C. stay with the inactive lead after the opportunity is qualified

D. automatically moved to the opportunity after the lead is qualified

Answer: D

Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/qualify-lead-convert-opportunity-sales

NO.22 You need to ensure that sales numbers reflect the accounting calendar.

What should you configure?
A. Rollup Queries
B. Business Closures
C. Sales Territories
D. Fiscal Year Settings
Answer: D

NO.23 You need to determine the cause of the error for approved quotes.
Why does the error occur?
A. The quote has been deleted.
B. The opportunity is in Active state.
C. The quote template is in Active mode.
D. The quote is in Active state.
Answer: D

NO.24 You need to create the required number of orders for ClientA.
How many orders should you create?
A. 1
B. 2
C. 3
D. 7
Answer: A
Topic 3, group of theaters Case Study
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Background
A company owns a group of theaters that stage live performances. Tickets to shows are sold by individual representatives by using a mobile app.
Each theater has a manager. The managers rotate between theaters every six months.

The company plans to implement Dynamics 365 Sales.
Current environment
The company uses the following pricing structure for tickets:

Quantity tickets per show	Pricing per ticket
Fewer than 10	$50.00
11 or more but fewer than 25	10 percent off ticket price
More than 26	15 percent off ticket price

Representatives create Microsoft Word documents to use as invoices. Pricing for tickets is often inconsistent.
Ticket sales are often lost because customers go to other shows.
Requirements
Business cards
* The business card of every group sales customer must be scanned and the image saved with the contact record.
* A customer's business card must be scanned even if the customer has been to the theater before.
* Business cards must show up on all contact forms.
Salespeople
* Each salesperson needs to sell a certain amount of tickets per month.
* The number of tickets each salesperson sells must be totaled only at the end of the month, before the monthly meeting between the salesperson and their manager.
* Salespeople must not be able to check the quantity sold in the system daily.
Opportunities
* The name of the sales manager must be added to opportunity records when sales representatives close opportunities.
* Opportunities that are lost must include the reasons other show and not interested.
* Some of the opportunities who order a large quantity of tickets every week want quotes quickly on various quantities. They want it broken down as follows:
*Price breakout by ticket
*Quantity discount amount
*Original ticket price
Orders
* Customers who buy a large quantity of tickets to a show must always get a quote first.
* Orders must always be created from the Quote record when it is a large purchase.
* Customers who buy a smaller quantity of tickets that do not have quotes must have an invoice sent to them.
Data Analysis
* Analyze email messages that pertain to ticket sales of the shows.
* Analyze relationships to help with potential sales of friends and coworkers for potential ticket buyers.
* Analyze accounts and assess the account representative's relationship with the customer to gauge the level of communication.
Visuals
A Tickets dashboard for all cashiers must be created that contains the following bar Charts:
* all the tickets sold for each show
* all the tickets available for each show
* accounts that have purchased groups of 10 or more tickets
* purchased tickets by age groups

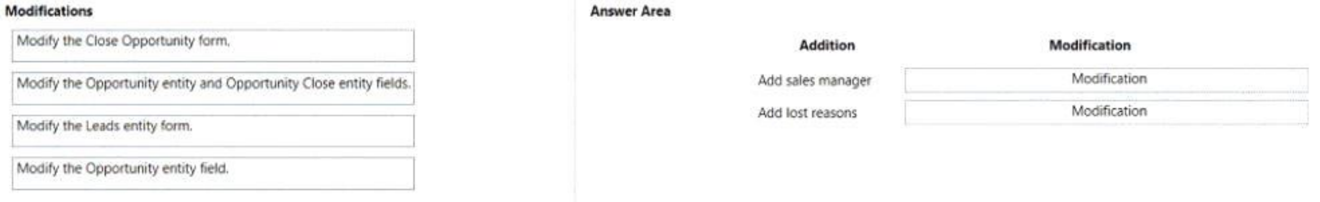
Shows

* Representatives must track which shows customers go to when they do not purchase the tickets to their shows. This information must be entered in the records.
* Every time a potential large sale is lost, the representative needs to ask the customer which show ticket was purchased instead of their show.
* Shows at other theaters must be updated on a monthly basis.
* Quantity discounts and bulk purchase for different shows must be consistent.

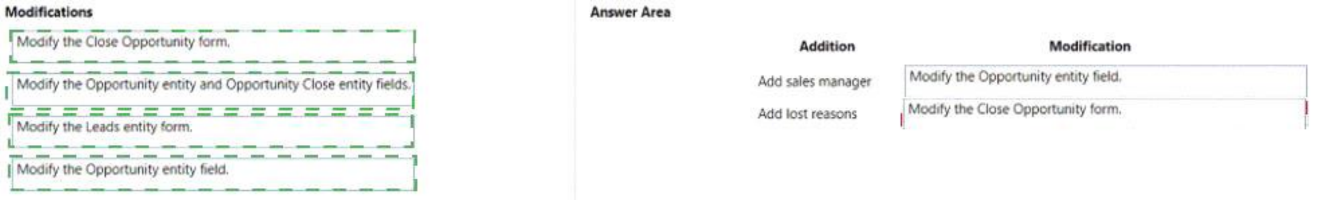
Issues

* The Tickets dashboard has eight sections. The dashboard includes a line chart that displays data about age groups. The dashboard also has a chart that group ticket sales. The chart shows 10 or more tickets sold but is missing accounts that purchased more than 20 tickets.
* Cashiers report that they cannot see two specific area of the Tickets dashboard. Salespeople report that they can see all areas of the dashboard.
* Representative 1 is unable to scan business cards.
* Some users do not see the business cards when using their desktop machines, but they see them from their tablets and mobile phones.
* There are no business card images in the system.
* Duplicate contacts are being created with business card scans.

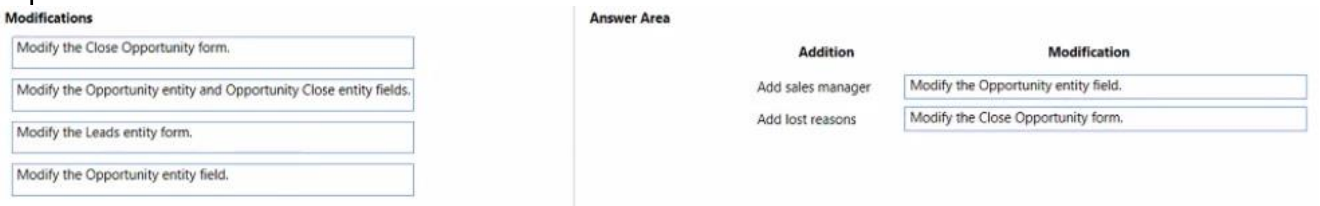
NO.25 You need to determine which configuration changes to make to address closed and lost opportunities.
Which modifications should you complete? To answer, drag the appropriate modifications to the correct additions. Each modification may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.
NOTE: Each correct selection is worth one point.



Answer:



Explanation:



NO.26 You need to resolve the issues on the ticket's dashboard.
Which configurations should you change? To answer, select the appropriate options in the answer area.

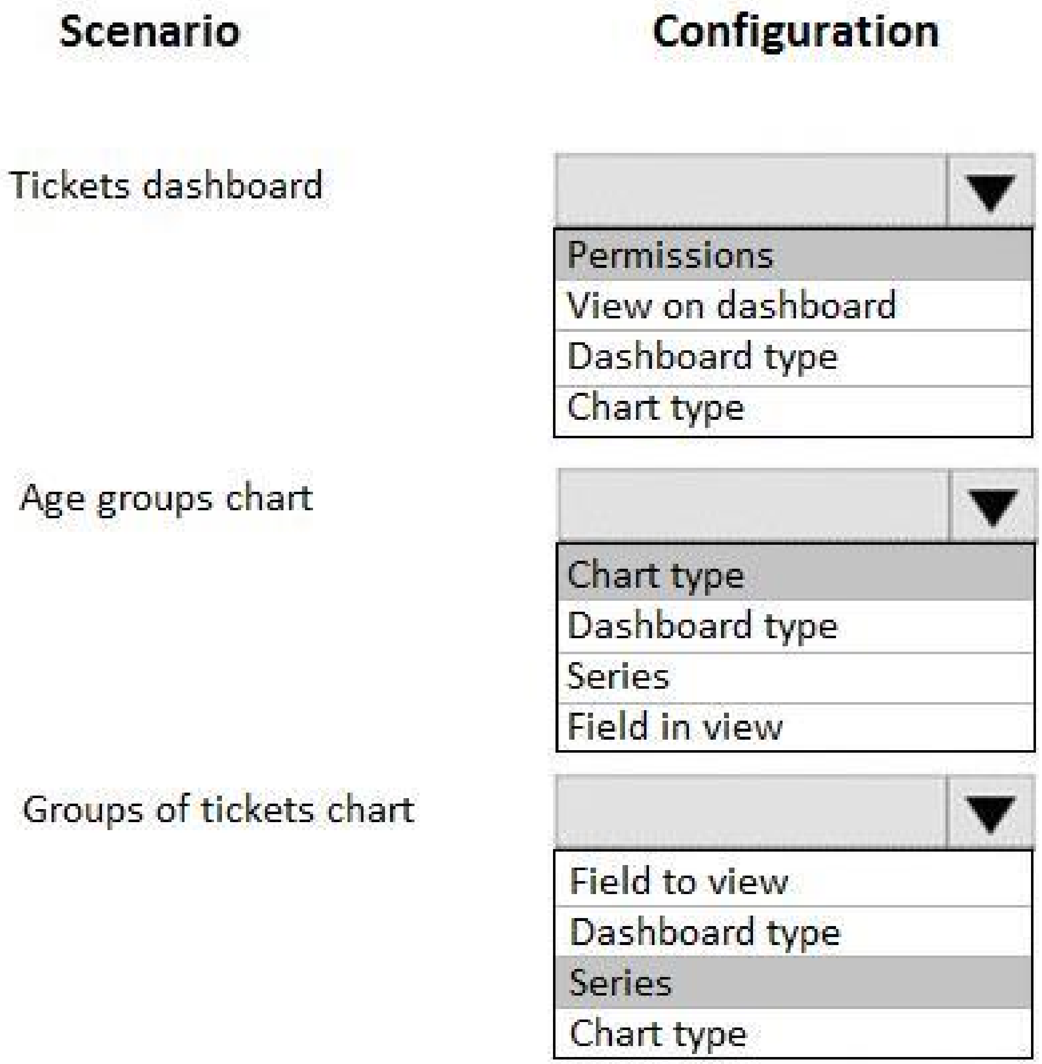
NOTE: Each correct selection is worth one point.

Scenario	Configuration
Tickets dashboard	Permissions View on dashboard Dashboard type Chart type
Age groups chart	Chart type Dashboard type Series Field in view
Groups of tickets chart	Field to view Dashboard type Series Chart type

Answer:

Scenario	Configuration
Tickets dashboard	Permissions View on dashboard Dashboard type Chart type
Age groups chart	Chart type Dashboard type Series Field in view
Groups of tickets chart	Field to view Dashboard type Series Chart type

Explanation:



NO.27 You need to choose which product's solution fits the analysis needed.
Which solutions should you use? To answer, drag the appropriate solutions to the correct analyses. Each solution 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.

Answer:

Explanation:

Analysis	Solution
Email messages	Free Sales Insights only
Relationship between accounts	Free Sales Insights or Advanced Sales Insights
Communication between customer and representative	Advanced Sales Insights only

NO.28 You need to configure the system for all the large quantity pricing requirements.
What should you do?

A. Create a workflow for price list

B. Create a quote with a write-in product

C. Create an opportunity.

D. Create a product catalog

Answer: D

Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/set-up-product-catalog-walkthrough

NO.29 You need to configure the system to handle all ticket sales.
What should you configure?

A. Discount Lists

B. Product Bundles

C. Product Catalog Settings

D. Goals

Answer: A

Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/set-up-discount-list

NO.30 You need to determine the cause of the issue with desktop users and business cards.
What is the cause of the issue?

A. The AI Builder Business Card control needs to be configured for the field on the form.

B. The field needs to be added to the form.

C. A business rule needs to be set up to show the field.

D. The users do not have the appropriate permissions.

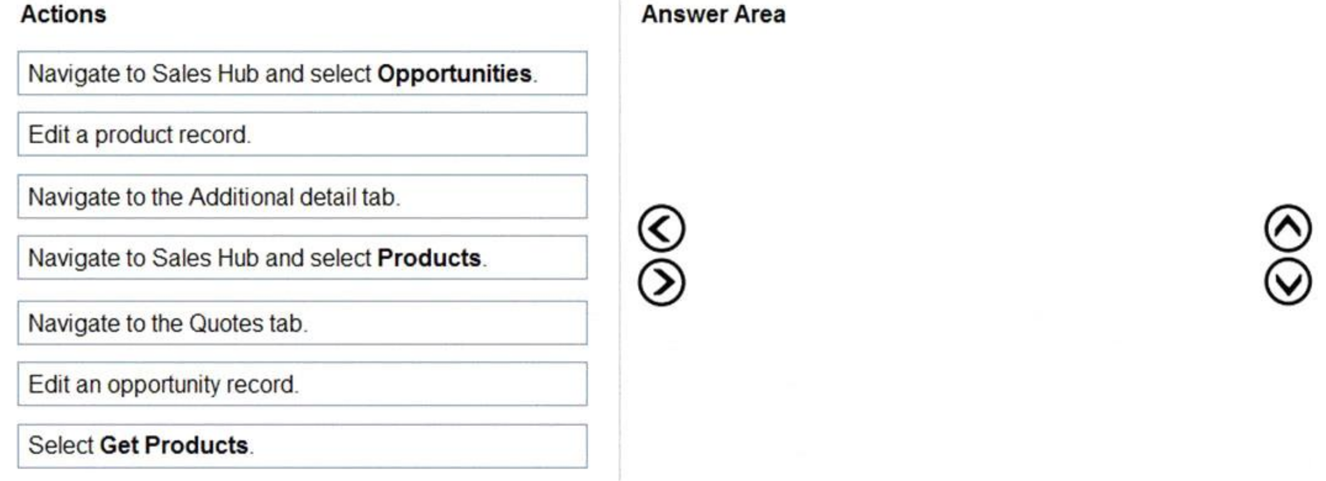
E. Show image on the form is not selected in Form Properties.

Answer: E

NO.31 You need to make the appropriate change to the system to ensure that statistics are correct in time for each manager/salesperson meeting.
What should you do?
A. Create a workflow for the Goals entity
B. In the Goals section of App Settings, select Actuals
C. In the Business Management section of Settings, configure Goal Metrics
D. In the Goals Settings section of App Settings, select Rollup recurrence
Answer: D
Explanation:
The number of tickets each salesperson sells must be totalled only at the end of the month, before the monthly meeting between the salesperson and their manager.
Salespeople must not be able to check the quantity sold in the system daily.

NO.32 You need to create orders for large quantity purchases.
What are two possible ways to achieve this goal? Each correct answer presents a complete solution
NOTE: Each correct selection is worth one point.
A. Create an invoice from the order record.
B. Make a copy of the quote and save it as won.
C. Select Won when prompted.
D. Select a Create order from the Quote record.
E. Select Convert to work order from the Opportunity record.
Answer: B D
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-professional/create-orders-sp

NO.33 You need to handle large quantity opportunities.
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.



Answer:

Actions

- Navigate to Sales Hub and select **Opportunities**.
- Edit a product record.
- Navigate to the Additional detail tab.
- Navigate to Sales Hub and select **Products**.
- Navigate to the Quotes tab.
- Edit an opportunity record.
- Select **Get Products**.

Answer Area

- Navigate to Sales Hub and select **Opportunities**.
- Edit an opportunity record.
- Navigate to the Quotes tab.
- Select **Get Products**.

Explanation:

- Navigate to Sales Hub and select **Opportunities**.
- Edit an opportunity record.
- Navigate to the Quotes tab.
- Select **Get Products**.

Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/create-edit-quote-sales

NO.34 You need to ensure that new managers receive the information they need.
What should you do? To answer, drag the appropriate actions to the correct information. 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.

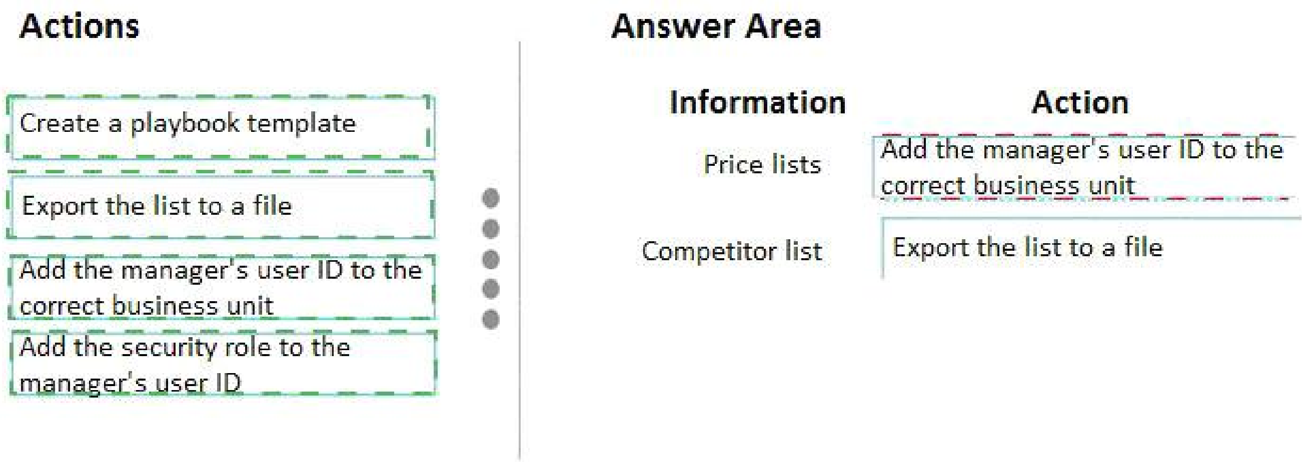
Actions

- Create a playbook template
- Export the list to a file
- Add the manager's user ID to the correct business unit
- Add the security role to the manager's user ID

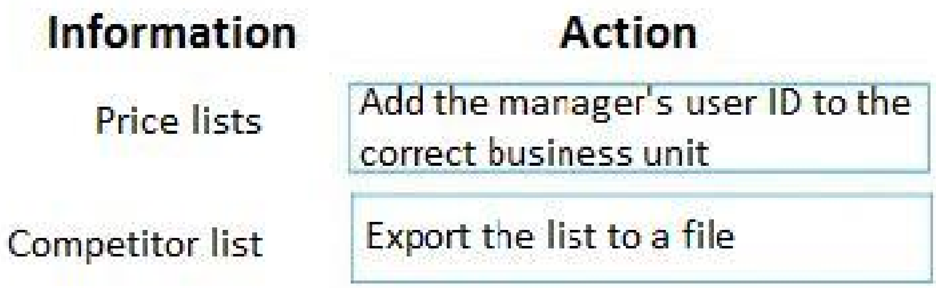
Answer Area

Information	Action
Price lists	Action
Competitor list	Action

Answer:



Explanation:



NO.35 You need to choose where to enter the other show names in the system. Where should you add the shows?

A. Product

B. Accounts

C. Contacts

D. Competitor

Answer: D

Topic 4, Contoso Ltd.

Background

Contoso, Ltd. manufactures electronic components for robotic assembly machines. The company specializes in wiring harnesses that are made to customer specifications.

The company's corporate office and a manufacturing plant are in Detroit. The company also has offices and manufacturing plants in the following countries:

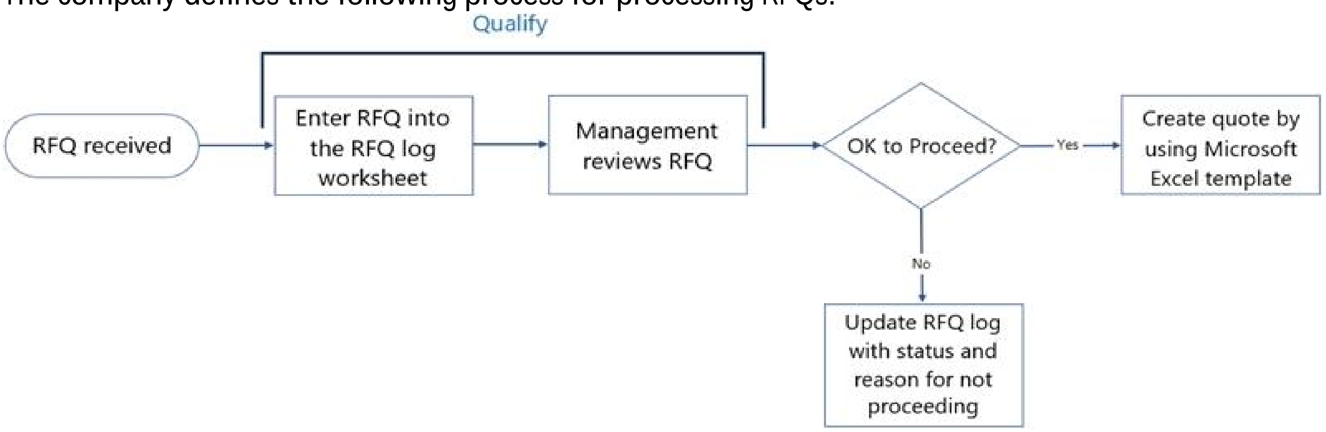
* China
* Germany
* Mexico
* United Kingdom (UK)

Current environment

Sales

* Customers who have operations in more than one country are managed by the sales team within the country from which a request originated. However, it is difficult to get information about sales for these customers.
* Each salesperson manually creates customer quotes using Microsoft Word and Excel templates.

This causes pricing inconsistencies, which is affecting profitability.
* Customers who have total sales over $1,5M per year receive special Preferred Customer discount pricing on products and services.
* Costs, pricing, and product availability vary greatly by country.
Sales teams
* Each office has a dedicated sales team. Sales are managed by a global team in countries without a sales office.
* Each sales team has a projected revenue target that is tied to the factory capacity in their country, except for the global team. The global team's projected revenue target is derived using a percentage of their actual sales from the previous year.
* Each sales team maintains a spreadsheet in which they record customer requests for quotes (RFQs). The spreadsheets are stored on a network drive.
* Sales team revenue targets are set yearly based on manufacturing capacities at each plant.
* Individual sales targets are based on product lines by quarter.
Current RFQ process
The company defines the following process for processing RFQs:



Requirements
General setup
* Standard functionality must be used when possible.
* All open RFQs must be imported into the solution.
* All information must be accessible to the entire executive management team.
* Country-specific sales information must be accessible only to sales representatives assigned to those teams.
* Sales and quote processes must be standardized across all sales divisions.
* Sales territories must be set up for each country as well as for a global territory.
* The global team will take over the management of RFQs for customers who have operations in more than one region.
* Due to regulatory considerations, the solution must be able to limit the kinds of products that can be sold by region.
RFQ management
* New RFQs must be entered initially into the system as Leads until they are reviewed.
* The default forecast categories must be used.
* Standardized quote formats and product pricing must be enforced across all sales offices.
* All tasks and follow-up activities with customers to close RFQs must be associated directly with the RFQs.
Credit and reference checks

* All new customers must undergo credit and reference checks before estimates are created for any RFQs.
This information will be recorded in a new custom field called Credit Check that has a Yes/No value.
* The finance manager must be assigned the credit and reference review when an RFQ is ready for review.
* If a customer's credit and reference review is unfavorable, the finance manager must follow up with the customer and the sales representative by phone.
* The customer's credit report must be added to the RFQ as a permanent record and for audit purposes.
* The solution must provide both a sample script that the finance manager can use as well as a checklist of how to perform the check.
Reporting
The sales manager dashboard must show the following data:
* Projected revenue and profitability per country by month and fiscal year.
* Projected and current product sales per country by month and fiscal year.
* RFQ Won/Loss revenue comparison by fiscal quarter.
* RFQ status by sales representative within their territory.
* RFQs that are awaiting management approval and how long they have been waiting.
* Sales lost to competitors month over month.
Managers must also be able to track how long an RFQ has been awaiting credit and reference checks, and how many RFQs have had unfavorable results from credit or reference checks.
Issues
* PreferredCustomerA, who has factories in Germany, the UK, and Canada, reports that their sales representatives give different pricing and discounts to customers depending on the country in which the RFQ is initiated.
* Several RFQs that have passed management review but failed standard credit checks have been issued quotes. To prevent this, credit checks must now be done before the management approval meeting.
* Several imported RFQs contain quotes for discontinued products. Updated quotes with current product offers need to be sent to customers.
* CompanyB needs pricing for harnesses for their plants in Germany, the UK, and Argentina.
* CompanyC received a quote for harnesses for their US home office. They need the products for their Canadian plant.
* CompanyD wants sales orders and shipments sent directly to VendorZ, who manufactures several subassemblies for them. VendorZ also builds components for other customers as well as for Contoso, Ltd.
* The chief financial officer (CFO) is concerned about the amount of work that the new credit and reference checks will create. Therefore, a time-study needs to be initiated for that work to see whether an additional person needs to be hired.