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Question 1

Question Type: Hotspot

You are a Dynamics 365 Sales administrator. You set the fiscal year to begin in January.

A sales manager needs a monthly forecast for the next three years that starts in August of the next year.

You need to configure the forecast using the fewest number of forecasts.

How should you configure each requirement? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Answer Area

Requirement	Configuration
How many forecasts are needed?	<input type="radio"/> 1 <input checked="" type="radio"/> 1 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5
What is the starting period for the forecast?	<input type="radio"/> next year <input type="radio"/> current year <input checked="" type="radio"/> next year <input type="radio"/> last year of the forecast <input type="radio"/> last open year
How many periods are needed?	<input type="radio"/> 36 <input type="radio"/> 12 <input checked="" type="radio"/> 36 <input type="radio"/> 48 <input type="radio"/> 60

Question 2

Question Type: Hotspot

You are creating a new account form for Inside sales. The company name is in the account name field. Company employees are entered as contacts.

The form must meet the following requirements with minimal additions:

- * List employee names.
- * include the street address, city, and state as one field.
- * Include columns to allow for entry of three separate email addresses.
- * Ensure that users can only edit the phone number and email columns.

You need to configure the form.

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

NOTE: Each correct selection is worth one point.

Answer Area

Information

Employees

Option

- Section
- Subgrid
- Composite column
- Section
- Event

Answer:

Address

- Composite column
- New column
- Existing column
- Composite column
- Section

Email

- Category
- Category
- Monitoring
- Track progress

Question 3

Question Type: Hotspot

You are consulting for a company that is installing Microsoft Power BI to work with a Dynamics 365 Sales application.

The administrator must configure each required option to successfully integrate the Sales Analytics template for use in Dynamics 365 Sales.

You need to identify which option to select.

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

NOTE: Each correct selection is worth one point.

Answer Area

Configuration	Option
Authentication method	<input type="text" value="OAuth2"/> Implicit OAuth2 Key
Privacy level	<input type="text" value="Organizational"/> Public Organizational Private

Answer:

Question 4

Question Type: DragDrop

A company is using Dynamics 365 Sales Premium with LinkedIn Sales Navigator.

You must configure the following process steps:

- * Set up a meeting and notify the manager if a quote is sent for over a million dollars.
- * Enable the salesperson to view LinkedIn customer profiles and manually add info to records without leaving the view.
- * Ensure that the sequence is added to existing quotes.

You need to enforce this process.

Which feature should you use? To answer, drag the appropriate features to the correct requirements- Each feature 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.

Features	Answer Area									
Adaptive sequence ▾										
Research activity										
Correct sequence	<table border="1"> <thead> <tr> <th data-bbox="1400 151 1570 177">Requirement</th> <th data-bbox="1809 151 1912 177">Feature</th> </tr> </thead> <tbody> <tr> <td data-bbox="1249 185 1648 210">Quote over a million dollars sent</td> <td data-bbox="1720 185 2024 210"></td> </tr> <tr> <td data-bbox="1249 218 1666 244">View LinkedIn profile and add info</td> <td data-bbox="1720 218 2024 244"></td> </tr> <tr> <td data-bbox="1249 252 1680 277">Sequence added to existing quotes</td> <td data-bbox="1720 252 2024 277"></td> </tr> </tbody> </table>	Requirement	Feature	Quote over a million dollars sent		View LinkedIn profile and add info		Sequence added to existing quotes		
Requirement	Feature									
Quote over a million dollars sent										
View LinkedIn profile and add info										
Sequence added to existing quotes										

Answer:

Question 5

Question Type: Hotspot

A company uses Dynamics 365 Sales. The company plans to use Microsoft SharePoint to organize documents.

All access to documents must be through Dynamics 365 Sales. You must limit document access to only salespeople.

You need to set up SharePoint for use.

What should you set up for each requirement? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Answer Area

Requirement

Document management through Dynamics 365 Sales

Answer:

Access limited to salespeople

Setup

Configure document management and SharePoint Online.

Configure Exchange Online and SharePoint Online.

Configure SharePoint Connector and SharePoint Online.

Configure document management and SharePoint Online.

Assign security roles in Dynamics 365 Sales only.

Assign security in SharePoint only.

Assign security roles in Dynamics 365 Sales only.

Assign Microsoft Security Group permissions in SharePoint.

Assign security in SharePoint and security roles in Dynamics 365 Sales.

Question 6

Question Type: MultipleChoice

A company uses Dynamics 365 App for Outlook for all Dynamics 365 Sales users.

Some salespeople want to automatically trade and link emails to Dynamics 365 Sales records.

You need to assist salespeople with automatic email tracking.

What should you do?

Options:

- A- Ensure that the email recipient address is the same as the one in Dynamics 365 Sales.
- B- Ask an administrator to enable the automatic tracking setting.
- C- In the Dynamics 365 App for Outlook, set up tracking in personal options.

D- Set up tasks in Outlook.

Answer:

C

Question 7

Question Type: MultipleChoice

A company uses Dynamics 365 Sales with Microsoft Exchange and server-side synchronization. All users have approved mailboxes. Some users report that emails will not send. You need to resolve the issue. What should you do?

Options:

A- Disable impersonation mode.

B- Add the email address to the email profile.

C- Turn on automatic tracking.

D- Test and enable the mailboxes.

Answer:

A

Question 8

Question Type: DragDrop

A salesperson progresses through the Lead to Opportunity sales process.

The diagram shows a sales process flow with five stages: **Lead to Opportunity Sales** (Active for 2 hours), **Qualify (2 Hrs)**, **Develop**, **Propose**, and **Close**. The **Qualify (2 Hrs)** stage is currently active, indicated by a red target icon above it. The other stages are locked, indicated by padlock icons above them. Navigation arrows are present on the left and right sides of the flow.

Qualify the lead

Associate a quote to the lead h one point.

Associate an opportunity to the lead

Complete all required fields in the stage

Actions

Answer Area

Actions	Answer Area	
	Current stage	Action
Answer: Qualify the lead		
Explanation:		
Associate a quote to the lead	Qualify	
https://docs.microsoft.com/en-us/dynamics365/sales/nurture-sales-from-lead-order-sales Associate an opportunity to the lead	Develop	
Complete all required fields in the stage	Propose	

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