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Question 1

Question Type: MultipleChoice

Please wait while the virtual machine loads. Once loaded, you may proceed to the lab section. This may take a few minutes, and the wait time will not be deducted from your overall test time.

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Your company wants every lead record to be rated as Cold when the record is created.

You need to configure the instance and validate your changes by creating and saving a new lead record named New roof for a user named Sam Smith.

To complete this task, sign in to the Dynamics 365 portal.

Options:

A- Explanation:

Go to Settings > Customizations.

Select Customize the System.

Under Components, expand Entities, and then select the Lead entity.

Select Fields.

Select the Rating field and click Edit.

Set the Default Value to Cold.

Click Save and Close.

Click Publish All Customizations.

In the site map, select Leads.

Select New.

Enter New Roof in the Topic field.

Enter Sam Smith in the Name fields.

Verify that the Rating is Cold.

Save the Lead record.

Answer:

A

Question 2

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You need to create a new field for an opportunity to capture the Billing Contact. The field must be populated by using a contact record. You must set the field as required, and then add the field to the form at the bottom of the Summary section.

To complete this task, sign in to the Dynamics 365 portal.

Options:

A- Explanation:

You need to create a customer lookup field then add it to the Opportunity entity.

Go to Settings > Customizations.

Select Customize the System.

Under Components, expand Entities, and then select the Opportunity entity.

Select Fields.

Click New.

Create the Billing Contact field.

Set the Field Requirement to Business Required.

Set the Data Type to Lookup.

For the Target Record Type select Contact.

Click Save and Close.

Click Publish All Customizations.

Open the Opportunities form.

In the Field Explorer drag the new field into the form.

Click Save

Click Publish

Answer:

A

Question 3

Question Type: MultipleChoice

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You need to update an opportunity to have a topic of Home Entertainment and to list that the opportunity plans to purchase from your competitor named Carter Electronics.

To complete this task, sign in to the Dynamics 365 portal.

Options:

A- Explanation:

In the site map, select Opportunities.

Open the opportunity record.

Type Home Entertainment into the Topic field.

Save the changes.

In the opportunity record, click Close as Lost.

In the Close Opportunity dialog box, click on the Competitor field then search for and select Carter Electronics.

Click OK.

Answer:

A

Explanation:

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

Question 4

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You receive a request to prevent a salesperson from advancing an opportunity to the Propose stage of the Lead to Opportunity Sales Process until the salesperson captures the customer need.

You need to configure your environment to meet the requirement.

To complete this task, sign in to the Dynamics 365 portal.

Options:

A- Explanation:

You need to edit the Lead to Opportunity Sales Process business process flow by making the step mandatory.

In the site map, select Sales Settings.

Under Customization, select Business Process Flows.

Select the Lead to Opportunity Sales Process business process flow.

In the Develop stage of the business process flow, select the Customer Need step.

Tick the Required checkbox to make this step mandatory.

Click Save to save the changes.

Answer:

A

Explanation:

<https://docs.microsoft.com/en-us/dynamics365/sales-professional/customize-business-process-flows>

Question 5

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You gather information from a prospect named Cat Francis to qualify the prospect as a new sales opportunity.

You need to identify the prospect, complete all the required fields, and qualify the prospect in the sales process.

To complete this task, sign in to the Dynamics 365 portal.

Options:

A- Explanation:

You need to create a lead and qualify the lead.

Navigate to Leads.

Click New.

In the Qualify stage of the process bar, select the contact named Cat Francis. When you select an existing contact while creating a lead record, the following information is automatically populated in the Lead form: First Name, Last Name, Job Title, Business Phone, Mobile Phone and Email.

Click Save.

In the Lead record, click the Qualify button in the toolbar. This will convert the lead to an opportunity.

Answer:

A

Explanation:

<https://docs.microsoft.com/en-us/dynamics365/sales/create-edit-lead-sales>

Question 6

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Your company plans to generate a report to provide reasons for the disqualification of leads.

You need to add a reason of Cannot meet timeline for delivery and then apply the reason to a Sales Lead named Brian LaMee.

To complete this task, sign in to the Dynamics 365 portal.

Options:

A- Explanation:

Navigate to Settings > Customization > Customize the System.

Expand the Entities menu.

Scroll down and expand Leads, then click on Fields.

Double click on the Status Reason field.

Change status to Disqualified.

Click Add.

Type in the new status reason: Cannot meet timeline for delivery

Click OK.

Click Publish All Customizations.

Open the lead named Brian LaMee.

From the command bar, click Disqualify and select the new status reason.

Answer:

A

Explanation:

<https://www.azamba.com/2018/08/16/how-to-add-a-reason-to-disqualify-a-lead-in-microsoft-dynamics-365-for-sales-crm/>

Question 7

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You need to create a copy of Sales Dashboard and name the dashboard Sales Dashboard 2. The new dashboard must NOT include a view that displays the activities widgets.

To complete this task, sign in to the Dynamics 365 portal.

Options:

A- Explanation:

Navigate to Dashboards.

Open the Sales Dashboard.

Click Save As and enter the name Sales Dashboard 2 to save a copy of the dashboard.

Click Edit.

Select the view that displays the activities widgets.

Click Remove

Click Save.

Answer:

A

Question 8

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A sales manager requests to view all the closed opportunities by source campaigns. The manager wants the visual formatted as a stacked bar comparison of which closed opportunities are won versus lost.

You need to configure your environment to provide access to the visual. You must name the visual Opportunities Won vs. Lost by Campaign.

To complete this task, sign in to the Dynamics 365 portal.

Options:

A- Explanation:

Create a new chart.

Select bar chart.

Name the chart Opportunities Won vs. Lost by Campaign.

Select the Opportunities view to be used by the chart.

Configure the Legend Entries for Opportunities Won and Opportunities Lost by source campaigns.

Click Save & Close.

Answer:

A

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