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Microsoft Dynamics 365 Sales Functional Consultant Sample Questions (Q304-Q309):

NEW QUESTION # 304

You manage a Dynamics 365 environment for Sales. You create the following rule items to respond to inbound emails from potential customers:

- * Emails that contain the words support or help must create a new high-priority case.
- * Emails that contain the words buy or purchase must create a warm-lead record. The words buy and purchase are more important than support or help.
- * Emails that specifically mention ProductA must always create a hot lead for that product regardless of other words mentioned.
- * If none of the targeted words are present in an email, a cold lead must be created.

You need to configure the order in which rule items are processed.

In which order should you run the rule items? To answer, move all actions from the list of actions to the answer area and arrange them in the correct order.

Actions	Answer Area
Create a hot lead	⬅ ➡ ⬆ ⬇
Create a case with high priority	
Create a warm lead	
Create a cold lead	

Answer:

Explanation:

Actions	Answer Area
Create a hot lead	⬅ ➡ ⬆ ⬇
Create a case with high priority	
Create a warm lead	
Create a cold lead	

Explanation:

Answer Area
Create a hot lead
Create a warm lead
Create a case with high priority
Create a cold lead

NEW QUESTION # 305

You need to determine which fields are required when opportunities are marked as lost. Which fields are required?

- A. Status Reason and Competitor
- B. Status Reason and Description
- C. Status and Contact
- D. Status and Stakeholders

Answer: A

Explanation:

Topic 1, Humongous insurance 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.

To 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.

At the end of this case study, a review screen will appear. This screen allows you to review your answers and to make changes before you move to the next section of the exam. After you begin a new section, you cannot return to this section.

To start the case study

To display the first question in this case study, click the button. Use the buttons in the left pane to explore the content of the case study before you answer the questions. Clicking these buttons displays information such as business requirements, existing environment and problem statements. If the case study has an All Information tab, note that the information displayed is identical to the information displayed on the subsequent tabs. When you are ready to answer a click the Question button to return to the question.

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 are 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.
- * Salesperson1 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 mettables need to 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 for 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 drill 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 qualify 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.

NEW QUESTION # 306

A company uses Dynamics 365 for Sales.

You need to reduce the number of pre-sales support days that are available based on the days the company is closed for public holidays.

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

NOTE: Each correct selection is worth one point.

Item	Value
Schedule type	▼ Holiday Recurrence
Option	▼ Number of days Owner  Microsoft

Answer:

Explanation:

Item	Value
Schedule type	▼ Holiday Recurrence
Option	▼ Number of days Owner 

Explanation

Item

Value

Schedule type

	▼
Holiday	
Recurrence	

Option

	▼
Number of days	
Owner	



Microsoft

NEW QUESTION # 307

A company releases a new catalog.

The company requires salespeople to do the following:

- * Contact customers about the new catalog.
- * Set up appointments with the customers to deliver the catalog.

You need to set up playbooks to track the activities.

What should you configure? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Requirement	Configuration
Set up playbooks for tracking activities.	Settings Activities Templates Categories
Set up record types for playbooks.	Accounts and Contacts Phone calls and Appointments Accounts, Contacts, and Activities Accounts, Contacts, and Sales literature

Answer:

Explanation:

Requirement	Configuration
Set up playbooks for tracking activities.	Settings Activities Templates Categories
Set up record types for playbooks.	Accounts and Contacts Phone calls and Appointments Accounts, Contacts, and Activities Accounts, Contacts, and Sales literature

Explanation:

Graphical user interface, text, application Description automatically generated



Reference:

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

NEW QUESTION # 308

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

After you answer a question, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.

You are a Dynamics 365 for Sales system customizer.

You need to set up LinkedIn Sales Navigator Lead (member profile) on the Lead form.

Solution: Use Unified Interface apps.

Does the solution meet the goal?

- A. No
- B. Yes

Answer: A

Explanation:

<https://docs.microsoft.com/en-us/dynamics365/customer-engagement/linkedin/add-sales-navigator-controls-forms>

NEW QUESTION # 309

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