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Microsoft

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Microsoft Dynamics 365 Fundamentals (CRM)



Question: 68

A company is considering implementing products and the product catalog in Dynamics 365 Sales. Sales transactions can occur in multiple currencies. The company wants to manage exchange rates. You need to explain to the company how Dynamics 365 Sales handles currency. Which two statements describe how Dynamics 365 Sales handles currency? Each correct answer presents part of the solution. NOTE: Each correct selection is worth one point.

- A. By default, all available currencies can be used.
- B. By default, a base currency is available and other currencies can be added as needed.
- C. Exchange rates are automatically updated.
- D. Exchange rates need to be updated manually.

Answer: BD

Reference:
<https://thescrmexpert.wordpress.com/2016/12/29/understanding-organizations-base-currency-in-dynamics-365-crm/>

Question: 69

DRAG DROP -
A company implements Dynamics 365 Sales. You need to recommend the features to implement that meet the following requirements:
• Display a landing page when a sales manager signs in that shows the pipeline, top leads, open opportunities, and won opportunities.
• Display an interactive list that allows sales representatives to see details for their accounts including the name, address, phone number, contact, and last contact date for the account. Allow sorting by any column.
Which features should you recommend?
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.
NOTE: Each correct selection is worth one point.
Select and Place:

Answer Area

Features	Requirement	Feature
Dashboard	Display a landing page when a sales manager signs in that shows the pipeline, top leads, open opportunities, and won opportunities.	
Report	Display an interactive list that allow sales representatives to see details for their accounts including the name, address, phone number, contact, and last contact date for the account. Allow sorting by any column.	
View		

Answer Area

Features	Requirement	Feature
Dashboard	Display a landing page when a sales manager signs in that shows the pipeline, top leads, open opportunities, and won opportunities.	Dashboard
Report	Display an interactive list that allow sales representatives to see details for their accounts including the name, address, phone number, contact, and last contact date for the account. Allow sorting by any column.	
View		View

Answer:
Reference:
<https://docs.microsoft.com/en-us/powerapps/maker/model-driven-apps/create-edit-views>

Question: 70

A company uses Dynamics 365 Sales.
You need to analyze account data and create reports based on the analyses.
Which solution should you use?

- A. Microsoft Forms Pro
- B. Power BI
- C. Power Automate
- D. Management Reporter

Answer: B
Reference:
<https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/introduction-sales-template-apps>

Question: 71

DRAG DROP -
A company implements Dynamics 365 Sales.
Users are unsure how to perform various tasks.
You need to recommend features to help the company configure the system.
What should you recommend? 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.
NOTE: Each correct selection is worth one point.
Select and Place:

Answer Area

Features	Requirement	Feature
charts	Schedule follow-up appointments.	
views	Display all appointments and sales orders for a day on a single page.	
dashboards	Configure a dashboard component that displays a list of quotes for the last quarter.	
activities		

Answer Area

Features

Requirement

Feature

charts

Schedule follow-up appointments.

activities

views

Display all appointments and sales orders for a day on a single page.

dashboards

dashboards

Configure a dashboard component that displays a list of quotes for the last quarter.

views

activities

Answer:

Reference:

<https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/manage-activities>

Question: 72

You are a sales representative for a company that sells furniture. You collaborate with an engineering team and a design team to support customer proposals.

The latest versions of all proposals must be available to both teams. Team members must be able to edit the proposals in real time.

You need to attach a proposal to a customer record.

Which mechanism should you use to attach the proposal?

- A. Timeline attachment
- B. Word template
- C. Documents tab

Answer: C

Reference:

<https://docs.microsoft.com/en-us/dynamics365/customerengagement/on-premises/basics/manage-sharepoint-documents-document-locations-in-dynamics-365-apps>

Question: 73

A company uses Dynamics 365 Sales. The company creates sales proposals as PDF documents.

The company wants multiple users to access the latest version of a sales proposal in Dynamics 365 Sales. Users must be able to attach notes to the proposal.

You need to recommend an app for the company.

Which app should you recommend?

- A. Microsoft Excel
- B. Microsoft Outlook
- C. Dynamics 365 Sales Insights
- D. Microsoft Teams

Answer: D

Reference:

<https://appsource.microsoft.com/en-us/product/office/wa104382045?tab=overview>

Question: 74

HOTSPOT -

A customer purchases Microsoft 365 and Dynamics 365 Sales.

For each of the following statements, select Yes if the statement is true. Otherwise, select No.

NOTE: Each correct selection is worth one point.

Hot Area:

Answer Area

Statement	Yes	No
Salespeople can only use Microsoft Teams to call customers who also use Teams.	<input type="radio"/>	<input type="radio"/>
Executives must have Power BI desktop installed to view Power BI reports shared with them.	<input type="radio"/>	<input type="radio"/>
Salespeople can share notes within Dynamics 365 Sales using OneNote.	<input type="radio"/>	<input type="radio"/>

Answer Area

Statement	Yes	No
Salespeople can only use Microsoft Teams to call customers who also use Teams.	<input type="radio"/>	<input checked="" type="radio"/>
Executives must have Power BI desktop installed to view Power BI reports shared with them.	<input type="radio"/>	<input checked="" type="radio"/>
Salespeople can share notes within Dynamics 365 Sales using OneNote.	<input checked="" type="radio"/>	<input type="radio"/>

Answer:
Reference:
<https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/configure-microsoft-teams-dialer> <https://docs.microsoft.com/en-us/power-platform/admin/set-up-onenote-integration-in-dynamics-365>

Question: 75

DRAG DROP -
You are designing reports for a pharmacy. The pharmacy uses Dynamics 365 Sales.
Match each tool to the reporting requirements.
Instructions: To answer, drag the appropriate tool from the column on the left to the requirements on the right. Each tool may be used once, more than once, or not at all.
NOTE: Each correct match is worth one point.
Select and Place:

Answer Area

Tools	Requirement	Tool
Microsoft Excel	Stakeholders do not have access to the environment. They must be able to view business data that is always up to date.	
Power BI		
Dynamics 365 Sales dashboard	Pharmacists need a list of the number of orders filled and to fill the next day, week, and month as well as a list of prescription drugs that are out of stock.	
Plug-in		

Answer Area

Tools	Requirement	Tool
Microsoft Excel	Stakeholders do not have access to the environment. They must be able to view business data that is always up to date.	Microsoft Excel
Power BI		
Dynamics 365 Sales dashboard	Pharmacists need a list of the number of orders filled and to fill the next day, week, and month as well as a list of prescription drugs that are out of stock.	Dynamics 365 Sales dashboard
Plug-in		

Answer:
Reference:
<https://docs.microsoft.com/en-us/powerapps/user/export-excel-dynamic-worksheet>



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*These questions are for demo purpose only. **Full version** is up to date and contains actual questions and answers.*

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