Accelerating Sales Pipelines with AI in Dynamics 365

Microsoft AB-210

Version Demo

Total Demo Questions: 6

Total Premium Questions: 69

Buy Premium PDF

Topic Break Down

Topic	No. of Questions
Topic 1, Set up and configure Dynamics 365 Sales	22
Topic 2, Manage leads and opportunities	16
Topic 3, Use Copilot in Dynamics 365 Sales	31
Total	69

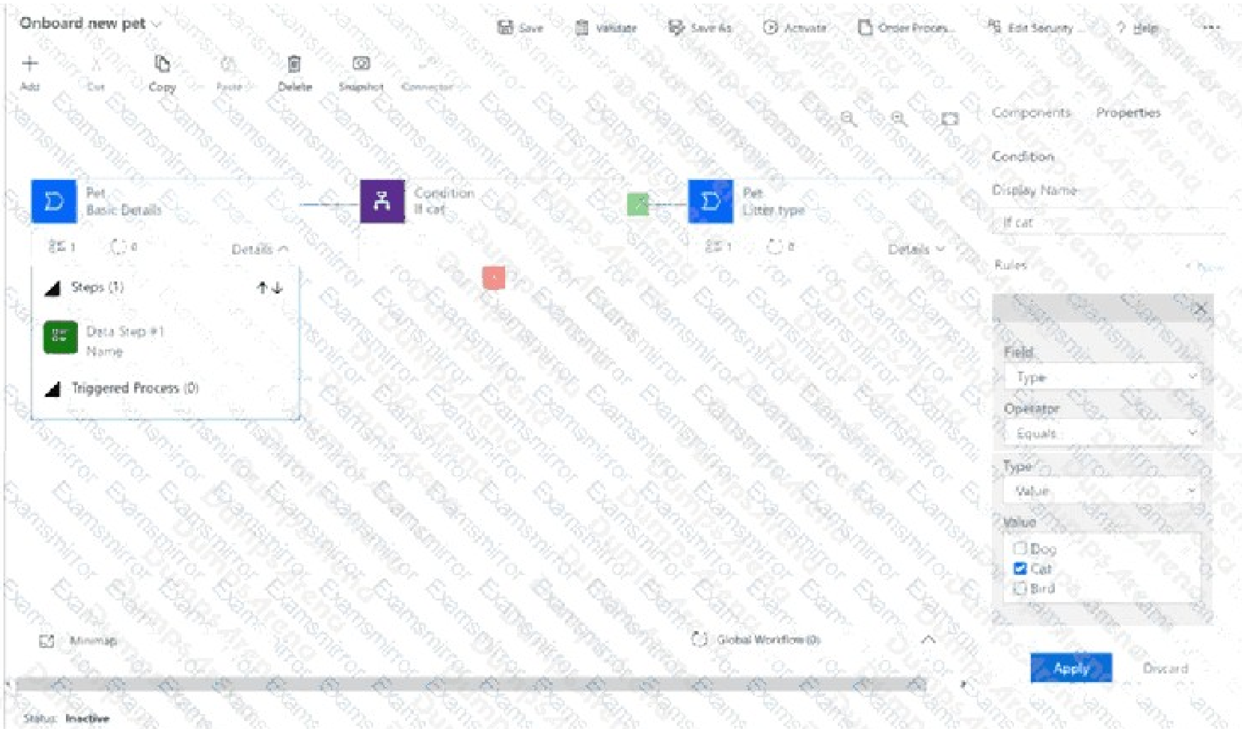
QUESTION NO: 1 - (SIMULATION)

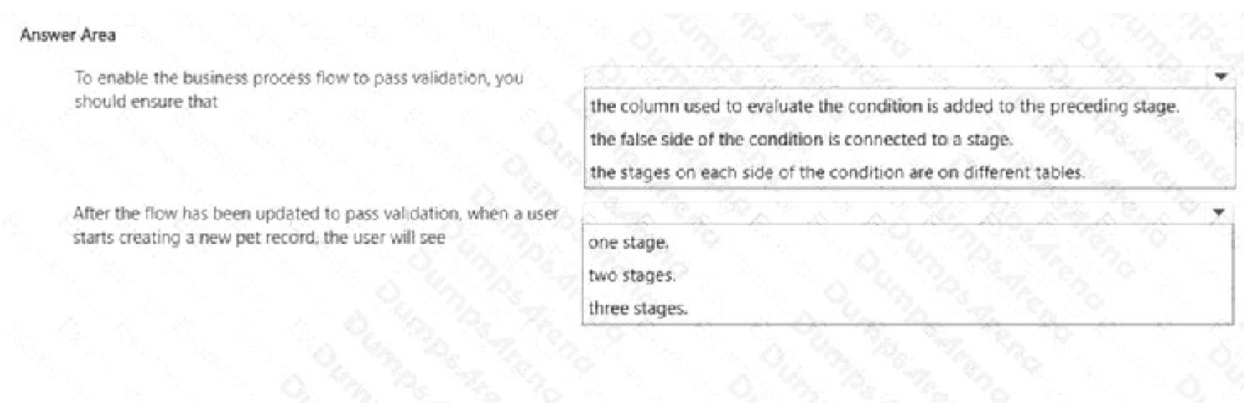
You are creating a business process flow named " Onboard new pet " to support onboarding of new clients for a pet care business.

A partially completed business process flow is shown in the following exhibit.

Use the drop-down menus to select the answer choice that completes each statement based on the information presented in the exhibit.

NOTE: Each correct selection is worth one point.





ANSWER: See the explanation for the answer

Explanation:

Selections:

The condition checks the `Type` column for the value `Cat`, but the preceding *Basic Details* stage currently has only the `Name` step. A business process flow condition must use a column that is included as a step in its immediately preceding stage. Add `Type` to *Basic Details*.

Initially, only *Basic Details* is shown. The conditional *Litter type* stage is shown only after the user supplies a `Type` value that meets the Cat condition.

QUESTION NO: 2 - (DRAG DROP)

A company tracks opportunities using the pipeline view.

The sales managers want pipeline stages configured so they can quickly identify deal progress.

The configuration must meet the following requirements:

. Open the Pipeline view by default in Opportunities.

. Open a specific form for the opportunity side panel.

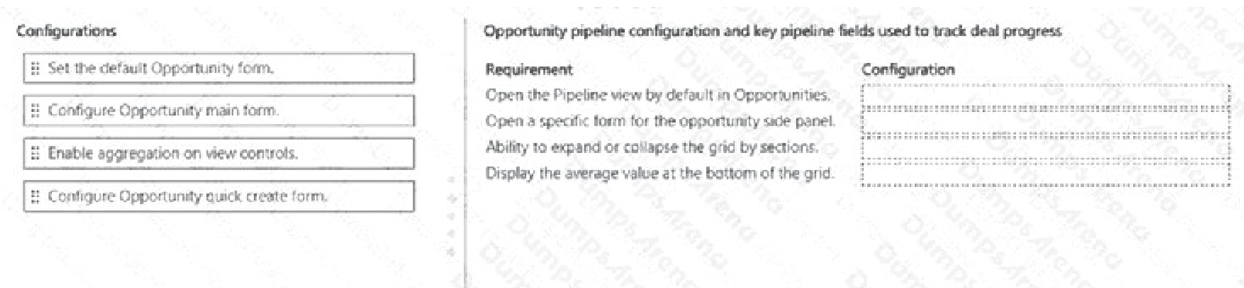
. Provide the ability to expand or collapse the grid by sections, for example Owner or Account.

. Display the average value at the bottom of the grid.

You need to identify the opportunity configuration.

Which configuration should you apply for each requirement? To answer, move the appropriate configurations to the correct requirements. You may use each configuration once, more than once, or not at all. You may need to move the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point



ANSWER:

Explanation:

The correct configuration uses the Opportunity main form to make Pipeline view the default experience for opportunities. Pipeline view is delivered through a view control placed on the main form, so configuring that form is where an administrator determines that sellers open opportunities in the pipeline-oriented layout. This makes deal movement and progress visible immediately rather than requiring sellers to change views after opening the table.

The specific form shown when a seller selects an opportunity in the pipeline is controlled separately by the default Opportunity form setting. Pipeline view opens record information in its side panel, and this setting determines which Opportunity form is used there. It lets the organization select a form containing the fields and business information that sales users need while they review or advance a deal.

Section expansion and collapse is provided by grouping in the Pipeline view control. When grouping is enabled, users can organize the grid by a relevant field, such as Owner or Account, and work with those grouped sections in the pipeline. Aggregation is configured on the same set of Pipeline view controls and provides grid-level calculated values. This is what enables a summary metric, including an average value, to appear at the bottom of the grid. Therefore, the aggregation-on-view-controls configuration is used for both the sectioned pipeline grid behavior and the average-value summary requirement.

Microsoft's pipeline view guidance describes configuring the control on the Opportunity form, selecting the default form for details, and enabling grouping and aggregation. See [Customize pipeline view in Dynamics 365 Sales] and [Opportunity pipeline view].

QUESTION NO: 3

A sales team contacts customers to promote and sell products.

You need the sales team to place outbound calls directly from Dynamics 365 Sales records using Microsoft Teams.

You need to enable calling directly from records.

What should you configure?

A. Configure phone numbers for outbound calling.

B. Enable the Microsoft Teams dialer.

C. Install the Dynamics 365 Sales mobile app.

D. Enable Microsoft Teams meeting integration.

ANSWER: B

Explanation:

Enable the Microsoft Teams dialer. is the required configuration because Teams dialer embeds Teams calling capabilities within Dynamics 365 Sales. After it is enabled for the appropriate Sales app and security roles, sellers can select a phone number on a lead, contact, account, or other supported record and initiate a Teams call without navigating away from their sales work. This directly supports the requirement to make outbound calls from Dynamics 365 Sales records rather than merely using Teams as a separate application.

An administrator configures this capability in the Sales Hub app settings under **Teams calls**. The organization must also have Microsoft Teams calling available for the users, including the applicable Teams Phone and PSTN calling configuration where required. Dynamics 365 Sales then provides the record-level experience that connects the seller's call action to Teams. Microsoft documents both the administrative setup and the seller experience, including calling a customer from a Sales record, in its Teams dialer guidance: Configure Microsoft Teams dialer in Dynamics 365 Sales and Use Microsoft Teams dialer in Dynamics 365 Sales.

QUESTION NO: 4 - (HOTSPOT)

A company plans to deploy AI agents in Dynamics 365 Sales to help sellers research accounts and summarize opportunity activity.

The company has the following requirements:

. AI capabilities must be activated in the environment.

. Administrators must be able to design, create, and manage AI agents.

. Sellers must have permissions that allow them to interact with AI-generated insights in Sales.

. AI agents must be able to read and analyze the organization's sales data stored in the platform.

You need to configure platform capabilities required for AI agents.

Which configuration should you apply for each requirement? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Prerequisites for AI agent deployment

Requirement	Configuration
Enable AI features in the environment.	Configure relationship intelligence. Deploy Copilot in Dynamics 365 Sales. Configure Sales Insights premium features.
Allow administrators to create agents.	Enable relationship analytics. Assign Copilot Studio author role. Configure opportunity forecasting. Assign the Sales Manager security role.
Allow sellers to use AI insights.	Enable AI insight cards. Assign Dynamics 365 Sales security roles. Assign Copilot Studio author permissions.
Allow agents to analyze sales records.	Create Power BI workspace. Enable mailbox synchronization. Configure Dataverse security permissions.

ANSWER:

Explanation:

AI agents in Dynamics 365 Sales depend on a combination of enabled Copilot capabilities, appropriate authoring access, Sales user roles, and secure access to Dataverse data. Deploying Copilot in Dynamics 365 Sales enables the Copilot experiences that provide generative AI assistance within the Sales application. This gives the environment the foundational AI capability needed for sellers to use AI-supported account research, opportunity summaries, and related insights. Microsoft describes how Copilot features are enabled for Dynamics 365 Sales in its Copilot setup documentation.

Creating and managing agents is an authoring activity. Administrators who perform that work require the Copilot Studio author role so that they can build, edit, publish, and manage agent functionality in the environment. Copilot Studio uses role-based access to distinguish agent makers from users who only consume an agent's capabilities. Microsoft documents these access requirements in Copilot Studio requirements and quotas.

Sellers need Dynamics 365 Sales security roles because their ability to work with Sales records and the AI experiences integrated into the Sales app is governed through Dynamics 365 role-based security. Assigning the applicable Sales roles gives sellers the permissions needed to access the Sales experience in which AI-generated information is presented and used.

Finally, an agent can only retrieve and analyze sales records that it is authorized to access. Sales data is stored in Dataverse, where security permissions control privileges on tables and individual records. Configuring Dataverse security permissions ensures the agent has the required read access within the intended scope while preserving the organization's data-security model. The underlying privilege model is described in Dataverse security roles and privileges.

QUESTION NO: 5 - (DRAG DROP)

A company uses AI agents to support opportunity management.

Sales managers require sellers to collaborate with the Dynamics 365 Sales AI agent for the following scenarios:

. Assessing opportunity risk.

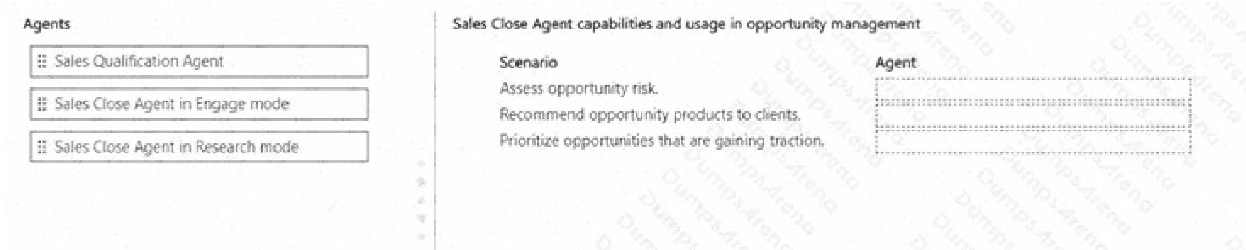
. Recommending opportunity products to clients automatically.

. Prioritizing opportunities that are gaining traction.

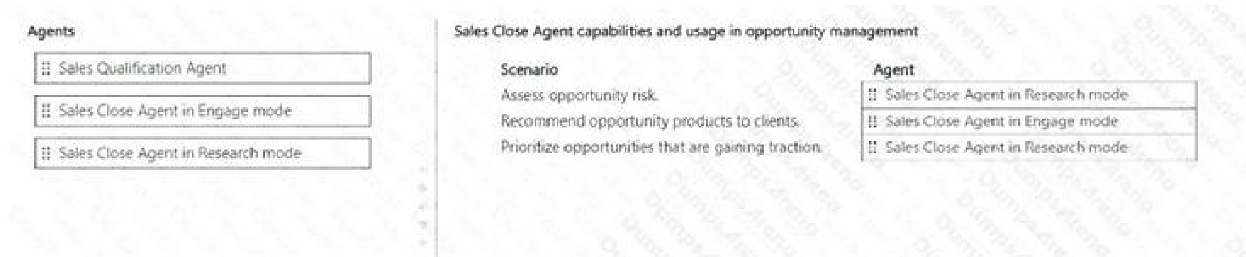
You need to determine the AI agent that should be used for each scenario.

Which agent should you use for each? To answer, move the appropriate agents to the correct scenarios. You may use each agent once, more than once, or not at all. You may need to move the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.



ANSWER:



Explanation:

Sales Close Agent in Research mode should be used for both assessing opportunity risk and prioritizing opportunities that are gaining traction. Research mode is designed to help sellers understand active opportunities by gathering and synthesizing relevant information, surfacing deal signals, and providing actionable intelligence. This includes identifying indicators that an opportunity may be at risk, such as gaps in engagement, competitive pressure, or other factors that could affect the likelihood of closing. It also helps a seller recognize opportunities with positive momentum, allowing the seller and manager to focus attention on deals that are progressing and merit timely follow-up. Because both scenarios require analysis and prioritization of existing opportunity data, the same research-focused agent can be assigned to each scenario. Microsoft's Dynamics 365 Sales documentation describes AI-supported seller workflows and opportunity intelligence at [Dynamics 365 Sales documentation].

Sales Close Agent in Engage mode should be used to recommend opportunity products to clients automatically. Engage mode supports customer-facing sales execution by helping move an active sales conversation forward. Product recommendations are part of this execution: the agent can use the available sales context, product information, and customer needs to suggest relevant products as the opportunity develops. This gives sellers useful, timely recommendations that can be incorporated into client interactions and helps progress the opportunity toward a transaction. Microsoft provides information on using Copilot and agent capabilities within sales processes at [Overview of Copilot in Dynamics 365 Sales].

The completed mapping is therefore: Assess opportunity risk — Sales Close Agent in Research mode; Recommend opportunity products to clients — Sales Close Agent in Engage mode; Prioritize opportunities that are gaining traction — Sales Close Agent in Research mode.

QUESTION NO: 6 - (HOTSPOT)

You are configuring Dynamics 365 Sales for a company.

Sales leadership wants to track monthly revenue targets for each seller and evaluate whether targets are achieved.

The configuration must include the following:

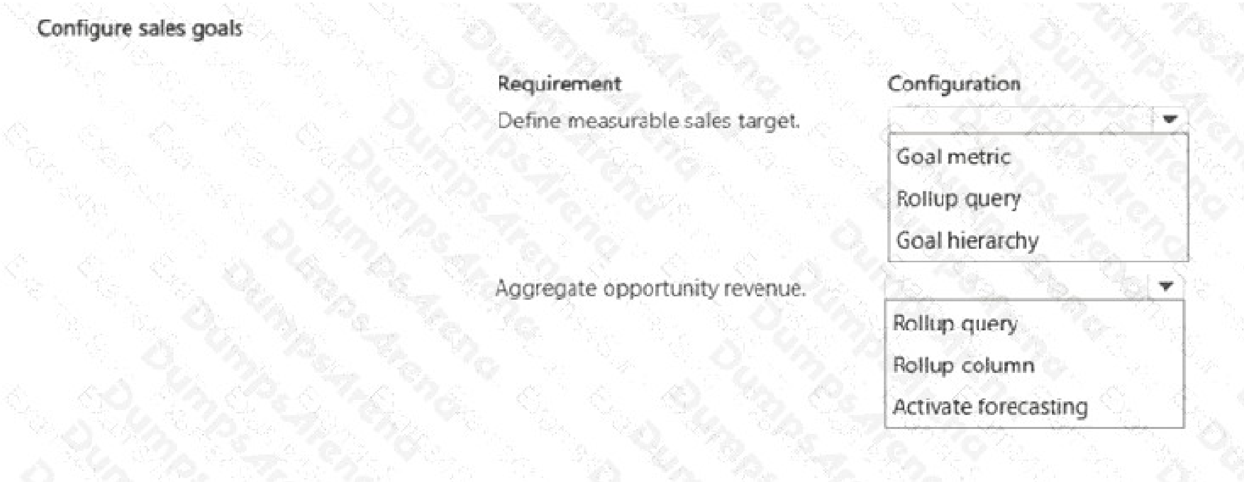
· Define measurable sales targets.

. Aggregate opportunity revenue.

You need to configure the system so that the sales performance can be measured using defined targets.

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

NOTE: Each correct selection is worth one point.



ANSWER:

Explanation:

A **Goal metric** should be configured to define the measurable sales target. In Dynamics 365 Sales, a goal represents a target for a specified owner and time period, such as a seller's monthly revenue target. The goal metric is the definition of what the goal measures. It establishes the measurement type and the calculation structure used to compare the target with the seller's actual performance. This allows sales leadership to consistently evaluate whether each seller has achieved the assigned monthly revenue target. Goal metrics also support the target, actual, and in-progress values that make goal tracking useful throughout the sales period. Microsoft describes goal metrics as the mechanism that defines the values used to measure goals and track progress: Set up goals in Dynamics 365 Sales.

A **Rollup column** should be configured to aggregate opportunity revenue. The goal metric uses rollup fields to obtain the values it measures from related sales records. For a revenue-focused target, the rollup configuration can use opportunity data and an opportunity revenue amount so that qualifying opportunity revenue is summed for the seller during the goal period. That aggregated monetary amount becomes the actual revenue value against which the monthly target is evaluated. This directly supports reliable performance measurement because the revenue total is calculated from the organization's opportunity records rather than entered manually. Microsoft's goal configuration guidance explains that rollup fields are used with goal metrics to calculate actual and other goal values from records such as opportunities: Define goal metrics in Dynamics 365 Sales.