



Vendor: Microsoft

Exam Code: AB-210

Exam Name: Accelerating Sales Pipelines with AI in
Dynamics 365

Version: DEMO

QUESTION 1

You are configuring Copilot capabilities in Dynamics 365 Sales for a company.

After enabling Copilot, sellers report that the summary insight banner on Opportunities, Leads, and Accounts is missing key business context and history.

You need to ensure that the missing information is displayed.

Which action should you perform?

- A. Configure the opportunity pipeline view settings.
- B. Enable Bing search and provide Bing search consent.
- C. Configure predictive scoring.
- D. Configure the table summary fields.

Answer: D

Explanation:

You should set up the table summary fields to fix this issue.

To make sure the missing key business context and recent history are properly captured in the summary insight banner, you must customize the fields that Copilot uses for its summaries and turn on audit history.

You can customize the summary fields for Opportunities, Leads, and Accounts by following these steps:

Navigate to App Settings: Open your Dynamics 365 Sales Hub app, switch to the Change area in the lower-left corner, and select App Settings.

Select Your Table: Click on Opportunities, Leads, or Accounts depending on which entity summary you want to adjust.

Configure Summary Fields:

Select the Summary tab.

Click Add fields.

Choose the fields that provide the missing business context (you can choose between 4 to 15 fields from the current table or related tables).

Reference:

<https://github.com/MicrosoftDocs/dynamics-365-customer-engagement/blob/main/ce/sales/copilot-configure-summary-fields.md>

QUESTION 2

Drag and Drop Question

A company is using Dynamics 365 Sales.

The company wants sellers to use a repeatable sequence for opportunities. The company has the following requirements for the opportunity stages:

- Must define the flow of work sellers must complete before closing an opportunity.
- Must guide sellers through data entry at each stage.
- Must report on the business process flow execution.
- Must ensure background process occurs after stage changes.

You need to configure a solution for each requirement.

Which configuration should you use 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.

Configurations	Sales process configuration elements	
	Requirement	Configuration
Required step fields	Define stages sellers must complete before closing opportunity.	
Power Automate cloud flow	Guide sellers through required fields during each stage.	
Business process flow stages	Report on business process flow execution.	
Active Opportunity Sales Process view	Ensure automation occurs after stage changes.	

Answer:

Configurations	Sales process configuration elements	
	Requirement	Configuration
Required step fields	Define stages sellers must complete before closing opportunity.	Business process flow stages
Power Automate cloud flow	Guide sellers through required fields during each stage.	Required step fields
Business process flow stages	Report on business process flow execution.	Business process flow stages
Active Opportunity Sales Process view	Ensure automation occurs after stage changes.	Power Automate cloud flow

Explanation:

Box 1: Business process flow stages

Business process flow stages would address this requirement.

In Dynamics 365 Sales, a Business Process Flow (BPF) is specifically designed to guide users through defined stages of a sales lifecycle (such as Qualify, Develop, Propose, and Close). Within each stage, you can define specific steps and fields that sellers must complete before they are allowed to advance to the next stage or close the opportunity.

Box 2: Required step fields

The configuration that would address the requirement to guide sellers through data entry at each stage is Required step fields.

In a Dynamics 365 Sales environment, opportunity stages are managed using a Business process flow (BPF).

Within each stage of a BPF, you can add data steps that correspond to specific fields. Setting these data steps as required ensures a "stage-gating" mechanism. This actively guides sellers by

forcing them to fill out the mandatory data entry points before they are allowed to advance the opportunity to the next stage.

Box 3: Business process flow stages

The option that would address the requirement is Business process flow stages.

Reporting capabilities: Every Business Process Flow (BPF) in Dynamics 365 automatically generates a corresponding background entity/table in Dataverse to record state and execution history.

Tracking progress: The stages within that BPF track data such as the active stage, the time spent in each stage, and when a stage was navigated. This allows managers to build out-of-the-box charts, dashboards, and Power BI reports specifically evaluating how opportunities are executing through each defined stage.

Box 4: Power Automate cloud flow

To address the requirement, you should use a Power Automate cloud flow.

Background Processing: A Power Automate cloud flow can run asynchronously in the background. It can be triggered automatically when the Active Stage or pipeline phase of a Business Process Flow (BPF) changes on an opportunity record.

Reference:

<https://d365training.com/blog/how-to-manage-opportunities-in-dynamics-365-sales-pipeline-stages-and-configuration>

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QUESTION 3

A company manufactures widgets. Widgets can be sold in the following ways:

Unit	Base unit	Description
Box		Contains 2 widgets
Case	Box	Contains 12 boxes
Pallet	Case	Contains 12 cases

The company discovers that customers in Europe want to purchase widgets individually. The company must update the EU price list to allow individual widget purchases.

You need to add a price list for the new unit named Each.

What should you do?

- A. Set Each as the primary unit.
- B. Update the unit Box with Each as the base unit
- C. Create the unit Each with Box as the base unit.
- D. Make Each the base unit for all units.

Answer: D

Explanation:

In Dynamics 365 Sales, unit groups define how products are sold in different quantities. The base unit is the smallest unit of measure in a unit group. Since customers now want to buy widgets individually, the smallest unit (Each) should be set as the base unit for all other units (Box, Case, and Pallet).

QUESTION 4

A company plans to deploy a Dynamics 365 Sales Hub app.

An administrator creates a Power Platform environment with the following configuration:

- The environment does not have a database.
- The environment is a sandbox environment.
- Access to the environment is restricted to a security group.
- The administrator has the System Administrator role.

You need to ensure that the administrator can deploy Dynamics 365 Sales.

Which two actions should you perform? Each correct answer presents part of the solution.

NOTE: Each correct selection is worth one point.

- A. Remove the security group restriction.
- B. Create a new environment.
- C. Assign a Dynamics 365 Sales enterprise license to the administrator role.
- D. Add Dataverse and enable Dynamics 365 apps.
- E. Enable server-side synchronization

Answer: CD

Explanation:

To ensure the administrator can successfully deploy the Dynamics 365 Sales Hub app, you must take the following two steps:

[D]

Add a database to the environment and set "Enable Dynamics 365 apps" to Yes.

Dynamics 365 apps require a Microsoft Dataverse database to function. Because the environment currently does not have a database, you must provision one and specifically select the option to enable Dynamics 365 apps during the database creation process. If this is not done, the environment will be provisioned as Dataverse-only, and Dynamics 365 apps cannot be installed later.

[C]

To deploy or install specific Dynamics 365 apps (like the Sales Hub app) within a Dataverse environment, the executing administrator must have a qualifying entitlement or license. Without a Dynamics 365 Sales Enterprise license, the option to configure or install the application will not be available.

Reference:

<https://learn.microsoft.com/en-us/troubleshoot/dynamics-365/customer-service/customer-service-admin-center/cant-install-dynamics-365-customer-service-apps-in-existing-environment>

QUESTION 5

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 in this section, you will NOT be able to return to it. As a result, these questions will not appear on the review screen.

You are deploying AI agents for a company using Microsoft Dynamics 365 Sales.

The company wants to ensure that AI usage is tracked and billed monthly.

The company requires that AI billing uses pre-paid credits.

You need to configure the billing based on the requirements.

Solution: Configure capacity coverages to the billing plan on the Dynamics 365 Sales environment.

Does the solution meet the goal?

- A. Yes
- B. No

Answer: B

Explanation:

Correct:

* Allocate capacity to the Dynamics 365 Sales environment.

To meet the requirements, you must allocate capacity to the Dynamics 365 Sales environment.

Microsoft Dynamics 365 Sales supports two core billing models for AI agents: Prepaid capacity (using Copilot Studio message packs/prepaid credits purchased in advance) and Pay-as-you-go (billed at the end of the month via Azure).

Allocate capacity to the Dynamics 365 Sales environment: Under the prepaid credit model, administrators purchase credit packs and then explicitly assign or distribute this capacity to the specific environment via the Power Platform admin center.

Incorrect:

* Configure capacity coverages to the billing plan on the Dynamics 365 Sales environment.

* Create a billing policy for the Dynamics 365 Sales environment.

This action are used specifically to set up the pay-as-you-go consumption model. Because the requirement strictly specifies that AI billing must use pre-paid credits, you do not connect an Azure billing policy for this path.

* Create an Azure subscription

This action are used specifically to set up the pay-as-you-go consumption model. Because the requirement strictly specifies that AI billing must use pre-paid credits, you do not connect an Azure billing policy for this path.

Reference:

<https://learn.microsoft.com/en-us/microsoft-sales-copilot/manage-consumption-based-billing>

QUESTION 6

Hotspot Question

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.

Configure sales goals

Requirement

Configuration

Define measurable sales target.

	▼
Goal metric	
Rollup query	
Goal hierarchy	

Aggregate opportunity revenue.

	▼
Rollup query	
Rollup column	
Activate forecasting	

Answer:

Configure sales goals

Requirement

Configuration

Define measurable sales target.

	▼
Goal metric	
Rollup query	
Goal hierarchy	

Aggregate opportunity revenue.

	▼
Rollup query	
Rollup column	
Activate forecasting	

Explanation:

Box 1: Goal Metric

To define and track measurable sales targets based on monthly revenue in Dynamics 365 Sales, you should configure Goal Metrics.

To establish this setup effectively, you will configure a combination of three core components within the Performance Management area.

Goal Metric: Define the metric type as Amount and the data type as Money. This establishes the baseline for tracking revenue.

Rollup Fields: Within your Goal Metric, create rollup fields to map how the system aggregates the revenue.

Goals: Create individual Goal records for each seller. On each seller's record, you will link your Goal Metric, assign the specific salesperson as the Goal Owner, set the Time Period to the respective month, and enter their specific revenue Target.

Box 2: Rollup Column

A rollup column is the correct feature to use for aggregating opportunity revenue in Dynamics 365 Sales. Rollup columns allow you to perform asynchronous, automated calculations (like SUM, COUNT, MIN, or MAX) on related child records—such as Opportunities—and display that aggregated total directly on a parent record, such as a Goal or a User profile.

Rollup Fields/Columns: Within your Goal Metric, create rollup fields to map how the system aggregates the revenue.

Reference:

<https://www.inogic.com/blog/2020/03/forecasts-goals-in-a-new-look>

QUESTION 7

You are implementing analytics for a company.

Sales managers want to view sales performance dashboards that use multiple data sources directly within Dynamics 365 Sales.

You need to enable embedded analytics.

Which three actions should you perform? Each correct answer presents part of the solution.

NOTE: Each correct selection is worth one point.

- A. Add a Power BI visual to the model-driven app form.
- B. Embed the Power BI report in a model-driven app dashboard.
- C. Configure the Dynamics 365 native dashboard settings.
- D. Enable Power BI visualization embedding.
- E. Create a Power BI report and publish it to the Power BI service.

Answer: BCE

Explanation:

To enable embedded analytics using multiple data sources directly within a Dynamics 365 Sales environment, you need to perform the following three essential steps:

1. Enable Power BI visualization embedding in Dynamics 365 settings

An administrator must first turn on the embedding feature by navigating to Advanced Settings -> Administration -> System Settings -> Reporting tab, and setting "Allow Power BI visualization embedding" to Yes.

2. Create the visuals and dashboard in Microsoft Power BI

Since the requirement involves aggregating multiple data sources (e.g., Dynamics 365 data mixed with external databases), you must build the data models, reports, and tiles inside Microsoft Power BI to handle the mash-up.

3. Embed the Power BI dashboard or tiles into Dynamics 365 Sales

In Dynamics 365 Sales, go to the Dashboards area, create a new dashboard (or edit an existing one), and choose Power BI Dashboard or add individual Power BI tiles to seamlessly display the external analytics alongside your native CRM data.

Reference:

<https://learn.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/analytics/power-bi-embedded-integration>

QUESTION 8

A sales team uses Dynamics 365 Sales to manage leads and opportunities.

Sales managers must be able to ensure that every qualified lead results in a follow-up task for the opportunity owner.

You need to create an automated solution by using Power Automate.

Which type of trigger should you use to start the flow?

- A. Scheduled
- B. Automated
- C. Instant

Answer: B

Explanation:

An automated trigger is the correct choice for this requirement.

You should use the Microsoft Dataverse connector with the "When a row is added, modified, or deleted" trigger.

No manual effort: An automated trigger runs instantly in the background whenever a specific event occurs in Dynamics 365. Event-driven: It will fire the exact moment a lead is qualified (which updates the Lead row or creates the Opportunity row), ensuring no follow-up tasks are missed.

Incorrect:

[Not C]

Instant triggers fail this use case: Instant cloud flows require a user to manually click a button, select a record, or trigger it from a Power App, which defeats the goal of hands-free automation.

Reference:

<https://learn.microsoft.com/en-us/dynamics365/sales/lead-management-overview>

QUESTION 9

A company manually assigns leads to salespeople.

The sales manager requires automated lead assignment rules. An administrator enables the feature. However, you are unable to access the Assignment rules area.

You need to request access from the administrator.

Which security role should you request?

- A. Salesperson
- B. Sequence Manager
- C. Vice President of Sales

Answer: B

Explanation:

Dynamics 365 Sales, Create and activate assignment rules

You can create and manage sequences and assignment rules through navigating to 'Personal Settings' area if users have sequence manager role.

Sequence Manager	Sales manager or an equivalent role who creates and manages sequences, segments, and assignment rules for the organization.	Sales Enterprise and Sales Premium	Create, edit, delete, and deactivate the following features in the sales accelerator • Sequences • Segments • Assignment rules
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Reference:

<https://community.dynamics.com/forums/thread/details/?threadid=36a7818d-0ff5-48c8-a9ea-f9b25d8d9e7e>

QUESTION 10

A sales company uses the Sales Qualification Agent to evaluate inbound leads.

A sales manager updates the qualification criteria to better align with the target customer profile.

After the update, monitoring data shows the following:

- A shift in how leads are categorized compared to earlier results.
- Continued processing of incoming leads.
- No gaps in evaluation activity.

You need to interpret the monitoring data to understand the agent's behavior.

What should you conclude?

- A. Changes in outcome distribution indicate that additional tuning may be required.
- B. Variation in categorization suggests that external factors are influencing lead evaluation.
- C. Differences between current and prior results indicate that earlier evaluations were incomplete.
- D. Lead outcomes reflect updated evaluation criteria applied during processing.

Answer: D

Explanation:

The valid conclusion about the agent's behavior is that lead outcomes reflect updated evaluation criteria applied during processing.

Direct Cause and Effect: The Sales Qualification Agent criteria were explicitly updated to align with a new target customer profile. The subsequent shift in how leads are categorized directly demonstrates that the agent is successfully applying these new rules to incoming data.

Continuous System Health: The fact that there is continued processing and no gaps in evaluation activity proves the agent is stable, operational, and actively processing the queue without technical interruption or systemic failure.

Reference:

<https://learn.microsoft.com/en-us/dynamics365/sales/sales-qualification-agent>

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