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**Exam : AB-210**

**Title :** Accelerating Sales Pipelines with AI in Dynamics 365

**Version :** DEMO

1. Topic 1, AdventureWorks Case Study

**Background**

AdventureWorks Cycles is a global manufacturer of high-performance bicycles headquartered in Seattle. The company sells products through distributors, specialty retailers, and a growing direct-to-consumer online channel. AdventureWorks Cycles recently expanded its product catalog to include the athlete package. This package includes a cycle, connected devices and subscription-based analytics services. To support this expansion, the company wants to modernize its sales operations by implementing Microsoft Dynamics 365 Sales. The leadership team wants sellers to focus on building relationships with distributors and enterprise buyers rather than manually qualifying leads or assembling product packages. The sales operations team is responsible for configuring the Dynamics 365 Sales environment. Their goal is to implement AI-driven processes that streamline the lead-to-cash workflow while ensuring that sellers can easily identify the most promising opportunities.

**Current Environment**

AdventureWorks Cycles previously used a legacy CRM system that tracked leads and opportunities but lacked predictive intelligence or automated lead qualification. Sellers manually evaluate incoming leads, which creates delays and inconsistent prioritization.
The global sales team manages approximately 15,000 leads per month generated from marketing campaigns, trade shows, and partner referrals.
Product data is stored in multiple systems. Product managers maintain products and pricing in spreadsheets. Information regarding custom relationships, competitor analysis, and region-specific marketing content is stored in a SharePoint site called the sales portfolio.

The organization has identified several challenges they want to resolve with a new solution:
Sellers often spend significant time researching leads that ultimately do not convert.
Regional managers require in-depth reporting using information from the sales pipeline and seller activities, the point-of-sale solution, website analytics, and the accounting system.
Multiple product offerings are difficult to manage because components are defined in different systems.
Team leads require real-time information on active opportunities, as well as visibility of seller's appointments and phone calls, without needing to navigate into multiple views.
All sellers are assigned Dynamics 365 Sales Enterprise licenses, Also, the CFO has requested that Copilot message packs are pre-purchased by using the Copilot Studio subscription license.
A Dynamics 365 sales sandbox environment has been in use for six months. There are 60 leads records with 30 records that are qualified and 20 that are disqualified. Ten of the qualified leads are over three months old.

**Business Requirements:**

AdventureWorks Cycles has defined the following business requirements for the production environment of Dynamics 365 Sales:
Sellers in all regions should be able to review the new mountaineer cycles. The cycles include economy and premium fittings. When creating opportunities, sellers should be able to select a metal type when adding a mountaineer cycle to an opportunity. The metal types include chrome, aluminum, and titanium. Pricing managers must be able to create deals for the same products in their own currencies and at their

own prices, without reference to the cost of the product.
Sellers must be able to quickly view their own opportunities by phase.
Predictive scoring should be enabled for leads created within the last three months in the sandbox environment. This should provide seller training on the scoring's interpretation and usage.
A segment of leads named Hot is needed that will contain all leads where the source is phone, employee referral or partner. Leads from this segment should be distributed to sellers by using a round robin method.
Agents should not be able to take action on any data that is created in the production environment before they are started.
All sellers should be able to access disqualified leads.

**Technical Information and Requirements:**
The new Dynamics 365 Sales environment must meet the following technical requirements:
Agents must use a dedicated service identity to execute write actions with a controlled security role in Dataverse.
The sales operations team lead must be assigned the Power Platform administrator role.
The lead pricing manager must be assigned to the Microsoft 365 billing admin role.
The vice president of sales must be assigned the AI admin role.
A sandbox and a production environment must be created. Both of the environments must be enabled for AI capacity, but usage should be capped on the sandbox environment.
A trial environment must be created, with the Sales Qualification Agent configured to business requirements.
Sellers must be assigned the security roles on the production environment only.
All sellers must be assigned a customized version of the salesperson role. This role should grant read access only to the leads that the sellers own.
The EnableRoleBasedSystemViews property must be set to true for the production environment.
No Azure subscriptions are available in the tenant.

**Issues:**
During early testing, the sales operations team identify the following issues:
The Sales Qualification Agent has disqualified several leads in the trial environment. The vice president of sales has requested to understand the reason for the disqualified leads.
Sellers are unable to create agents in the production environment.
Agent consumption has been unreliable. The company requires that AI capacity is always available to sellers.

The required predictive scoring model cannot be created yet.
You need to inform the sales team how many more record types are needed before it can be configured.
What two actions on lead records are required? Each correct answer presents part of the solution.
Choose two.
A. 40 more leads must be created.
B. 20 more leads must be disqualified.
C. 10 more leads must be qualified.
D. 20 more leads must be qualified.

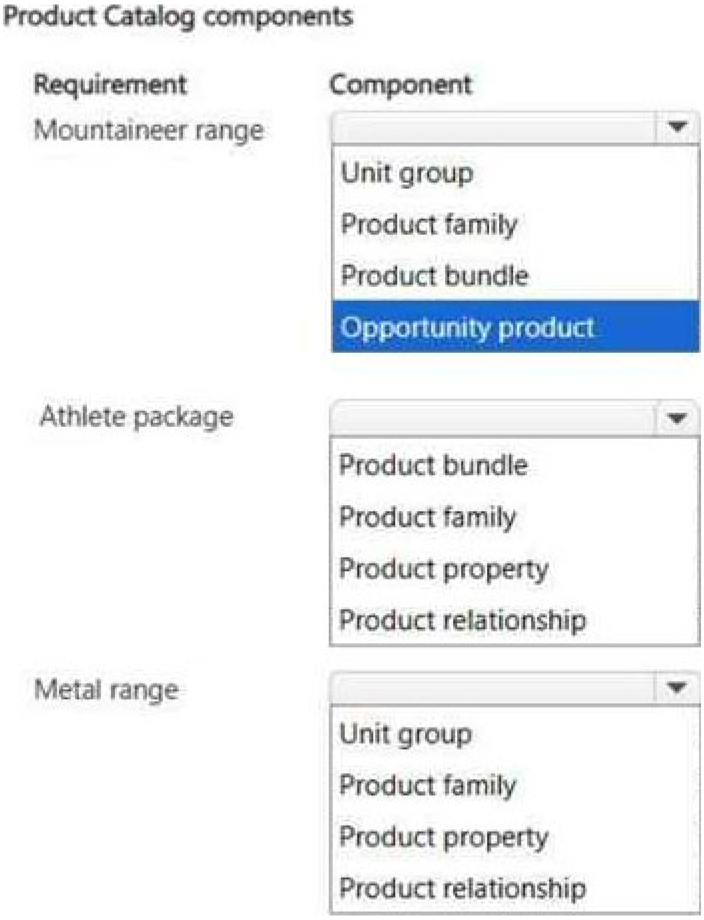
E. 30 more leads must be disqualified.
**Answer:** B, D
**Explanation:**
For Dynamics 365 Sales predictive lead scoring, the model cannot be created unless there is enough historical lead outcome data in the selected training window. Microsoft's predictive lead scoring configuration requirement states that the organization must have at least 40 qualified leads and 40 disqualified leads in the selected training period. The official guidance specifically explains that if the model is trained with leads from the past three months, the organization needs "at least 40 qualified and 40 disqualified leads" created and closed during that period.
In the sandbox, AdventureWorks has 30 qualified leads and 20 disqualified leads. However, 10 of the qualified leads are older than three months, and the business requirement says predictive scoring must be enabled for leads created within the last three months. Therefore, only 20 qualified leads are usable for this model. The sandbox currently has 20 usable qualified leads and 20 disqualified leads. To meet the required threshold of 40 each, the company needs 20 more qualified leads and 20 more disqualified leads. Simply creating 40 new leads is not enough because predictive scoring requires outcome-classified leads, not merely open or newly created records.
References/topics: Configure predictive lead scoring; lead scoring model training data requirements; AI-driven lead prioritization in Dynamics 365 Sales.

2.You need to allow sellers to view leads disqualified by the Sales Qualification Agent in production.
Which two actions should you perform? Each correct answer presents part of the solution. Choose two.
A. Upgrade the agent to research and engage mode.
B. Update the EnableRoleBasedSystemViews setting.
C. Update the agent look back period.
D. Assign organization level read on lead table to sellers.
**Answer:** B, D
**Explanation:**
The required fix is about visibility and security, not agent operating mode. In the scenario, production has EnableRoleBasedSystemViews set to true, which restricts system views based on role configuration. Because the business requirement says all sellers should be able to access disqualified leads, the role-based system view setting must be updated so sellers can access the view that exposes leads disqualified by the Sales Qualification Agent.
The second required action is to change Lead table permissions. The customized Salesperson role currently grants sellers read access only to leads they own. That is too restrictive because leads disqualified by the Sales Qualification Agent may not be owned by each seller. To let all sellers view those records, sellers need organization-level Read permission on the Lead table.
Option A is wrong because upgrading the agent to research and engage mode affects how the agent researches and interacts with leads; it does not solve seller access to disqualified records.
Option C is also wrong because the look-back period controls which historical leads the agent evaluates, not who can view disqualified leads.
References/topics: Sales Qualification Agent; role-based system views; Dataverse security roles; Lead table read access; AI-driven lead qualification.

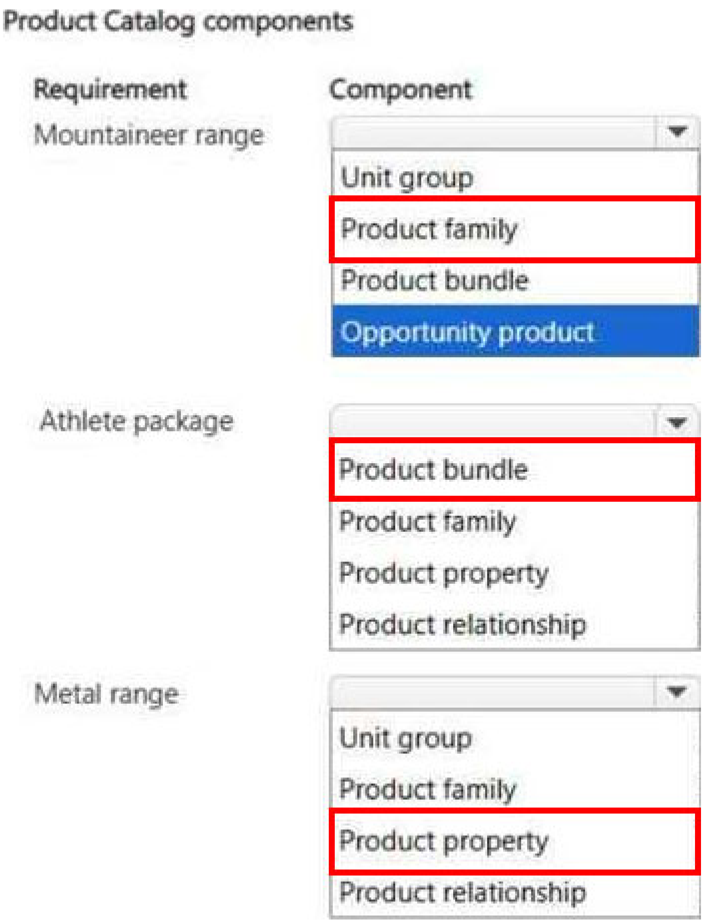
3.HOTSPOT

You need to configure the AdventureWorks Cycles product catalog.

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




**Answer:**




**Explanation:**

Requirement Component

Mountaineer range Product family

Athlete package Product bundle

Metal range Product property

The Mountaineer range should be configured as a Product family because it represents a product classification hierarchy. Dynamics 365 Sales uses product families to organize related products, child products, and bundles under a parent structure. Microsoft's product catalog guidance states that product families can contain child product families, products, and bundles in a hierarchy, which fits the mountaineer cycle range with economy and premium fitting variations.

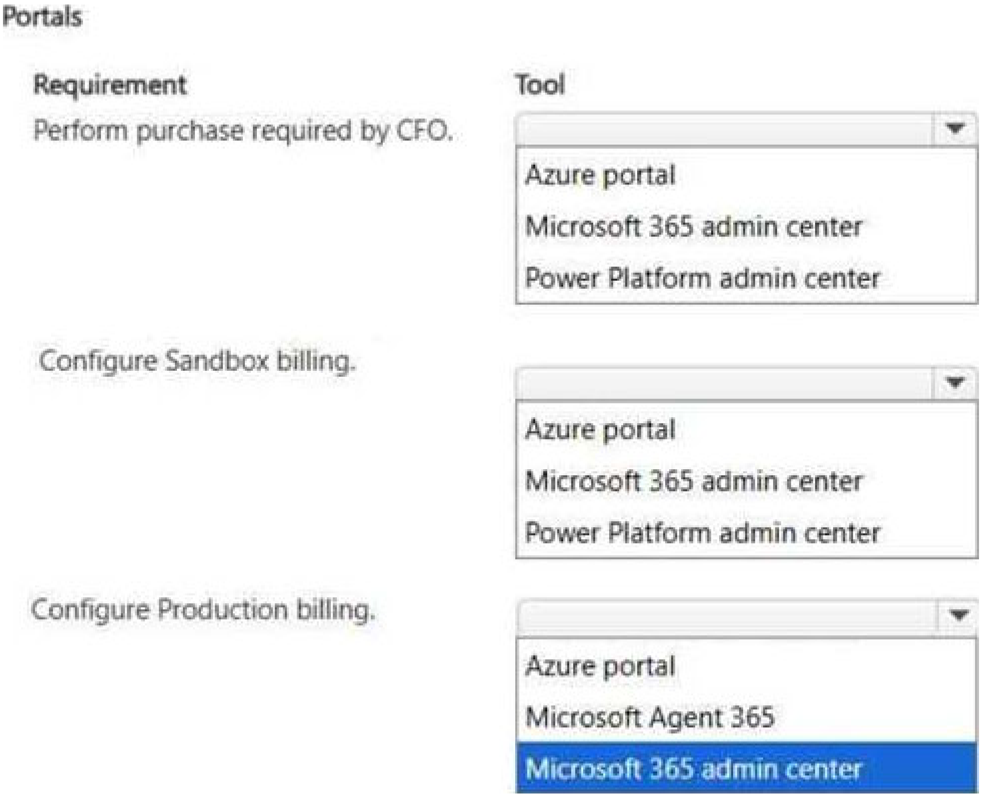
The Athlete package should be configured as a Product bundle because it combines multiple sellable items: a cycle, connected devices, and subscription-based analytics services. A bundle is used when multiple products are sold together as one commercial package. Dynamics 365 Sales allows products to be associated with a bundle, including quantities and required or optional components.

The Metal range should be configured as a Product property because sellers must choose a configurable attribute—chrome, aluminum, or titanium—when adding the mountaineer cycle to an opportunity. Product properties define product characteristics such as size, color, or component, and can be used at run time when adding products to opportunities, quotes, orders, or invoices.

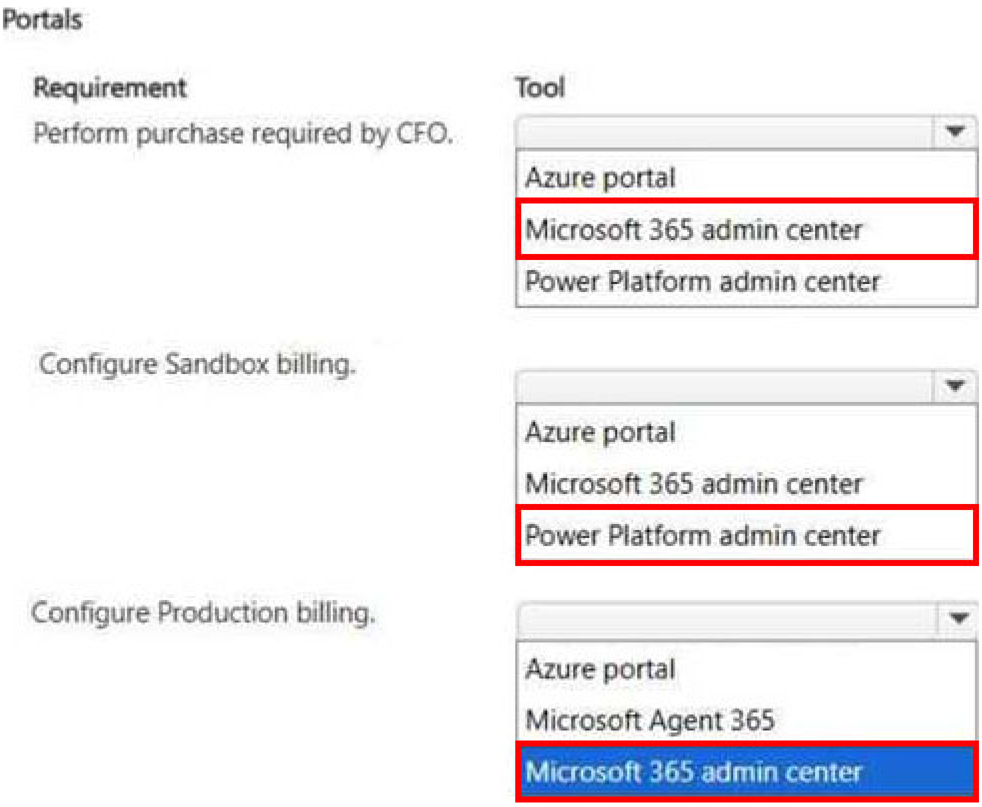
References/topics: Product catalog setup; product families; product bundles; product properties; opportunity product configuration.

4.HOTSPOT

You need to configure the required billing for Copilot and agent capabilities.
What should you use for each requirement? To answer, select the appropriate options in the answer area.




**Answer:**




**Explanation:**

Requirement Tool
Perform purchase required by CFO Microsoft 365 admin center
Configure Sandbox billing Power Platform admin center
Configure Production billing Microsoft 365 admin center
Why: Production requires reliable AI capacity so sellers are not blocked when prepaid Copilot capacity is depleted. The correct production setup is pay-as-you-go /billing policy configuration through the Microsoft 365 admin center. Azure portal is not the best answer here because the scenario says no Azure subscriptions are available, and Microsoft 365 admin center can be used for the billing policy workflow. Microsoft Agent 365 is for agent management/governance, not billing configuration.

5. Topic 2, Contoso Ltd Case Study

**Background:**
Contoso Ltd. is a global technology distributor headquartered in Redmond, Washington. The company sells networking equipment, cloud infrastructure, and managed services to enterprise customers across North America and Europe.
Contoso Ltd. currently manages its sales operations by using Microsoft Dynamics 365 Sales and plans to enable Sales Insights in the future.
The leadership team wants to modernize the sales organization by introducing capabilities that help sellers prioritize leads, analyze opportunities, and accelerate deal closure.
The company has approximately 150 field sellers, 40 insider sellers, 20 sales managers, and a central IT team responsible for configuring the sales platform.
Contoso Ltd.'s executive leadership has defined the following goals for the new sales platform implementation:
Improve seller productivity by reducing manual research and data entry.
Use AI insights to prioritize leads and opportunities.
Provide automated recommendations to sales representatives throughout the deal lifecycle.
Improve collaboration between sellers and sales managers.

**Current Environment:**
**Sales platform**
Contoso Ltd. uses Microsoft Dynamics 365 Sales integrated with Microsoft 365 services.
The following components are currently deployed:

| Component | Status |
|---|---|
| Dynamics 365 Sales Enterprise | Deployed globally |
| Dynamics 365 Sales Insights | Planned |
| Outlook integration | Enabled |
| Teams | Used for internal collaboration |
| SharePoint | Used for storing sales documents |
| Power Automate | Used for simple approval flows |

**Data and lead management**
Leads are important for driving new business at Contoso Ltd.
They are generated from multiple sources including:
Marketing automation campaigns

Website registrations
Partner referrals
Trade show contact imports

Marketing teams import lead lists weekly into Dynamics 365 Sales by using spreadsheet imports.
Sellers currently evaluate leads manually.
Sales managers report that this process results in inconsistent prioritization across regions.

**Opportunity management**
Opportunities are tracked in Dynamics 365 Sales through a defined qualification-to-opportunity lifecycle to ensure accurate reporting.
Sales leadership has requested the Contoso Ltd.

IT team to evaluate the following capabilities:
AI-generated summaries of opportunity records.
AI-driven research for customer organizations.
Automated recommendations for closing deals.

**Business Requirement:**
Contoso Ltd.'s executives have defined the following business requirements:

**Lead management**
Inside sellers must use a seller engagement workspace that prioritizes leads automatically based on predicted likelihood to convert.
All sellers are guided through a consistent set of qualification steps aligned to Contoso Ltd.'s sales strategy.
Leads cannot be advanced to the development stage until a decision maker has been confirmed.
Sales leadership requires flexibility in how leads are converted. Inside sales need automatic opportunity creation. Field sellers need the option to manually decide whether an opportunity should be created when a lead is qualified.
Lead scoring must be implemented to help sellers identify high potential leads automatically.
Lead scoring must continuously improve based on historical sales outcomes.

**Opportunity development**
The opportunity flow must be improved by using AI-driven research and automated insights.
Field sellers must be able to access contextual research about customers and competitors while working on opportunities.
Opportunity records must display AI-generated summaries to reduce the time required to review historical activities.
Field sellers must use the Opportunity pipeline view to visualize, prioritize, and manage opportunities.
All opportunity revenue must be calculated using opportunity line items based on selected Contoso Ltd.'s products and standard pricing.
Sales managers must receive an external quarterly competitive intelligence brief to help with their research. This should be delivered as a PDF document.

**Sales performance**

Sales managers require improved pipeline and revenue forecasting capabilities. The managers need to report on their business performance and use insights, visuals, and recommended next actions.

The new solution must provide the following:
Allow sales managers to configure forecasts for opportunity pipelines.
Notify the seller's manager when a draft quote is created and requires approval.
Allow leadership to track performance against revenue goals.
Ask questions about Dynamics 365 Sales data to support executive analysis and decision making.
Support data definitions used at Contoso Ltd. when reporting.

**Technical Requirement:**

Contoso Ltd.'s IT department defines the following priorities for the sales platform.

**AI capabilities**

The platform must support the following AI features:
Lead scoring to guide sellers to priority items.
Opportunity research insights to prepare deal analysis.
Copilot-generated summaries of sales records to help with decision making.
AI-powered research and analytics to aid leadership reporting.
When performing sales research, sales managers must be able to save their favorite prompts.

**Automation**

Automation must be implemented to guide sellers through recommended next steps during the sales cycle.
Any approvals must use the Power Automate Approvals connector.
Field sellers use the existing Lead to Opportunity Business Process Flow to manage their leads.
A Power Automate desktop flow is used to process orders into a partner ordering application that completes fulfillment.

**Collaboration**

All sellers must be able to collaborate by using Teams and store related sales documents in SharePoint.

**AI-driven insights**

The company is deploying the Sales accelerator to guide seller activities.

**The Sales Research Agent**

Sales managers will use the Sales Research Agent to gather intelligence about customer organizations.

The sales managers have the following requirements:
Must be able to reuse visualizations after they are created; they don't want to recreate them.
Must have a consistent method to quickly return to a blueprint that they frequently use.
Must be able to retain a library of questions to receive consistent responses based on definitions

approved by the company.
Should have Bing search enabled on the environment for generative AI feature settings.

**Platform extensions**
The IT department plan to extend the platform by doing the following:
Create Power Automate flows to automate seller tasks.
Embed Power Apps components inside model-driven forms.
Embed Power BI reports for sales analytics.

**Testing**
The IT department is testing predictive lead scoring with a small group of sellers.
The IT department edits the existing lead scoring model by adding new fields.

**Issues:**
Users have reported the following issues:
Field sellers spend a significant amount of time researching customers before engaging with prospects.
Sales managers cannot easily identify the most promising opportunities across regions.
Lead prioritization varies significantly between sales teams.
Testers report they cannot access the field changes in the lead score.
A sales manager generated a blueprint but forgot the competitive intelligence brief.

You need to configure the new lead qualification experience in Dynamics 365 Sales for field sellers.
What should you configure?
A. Set related record creation to Seller.
B. Enable auto-create records for newly qualified leads.
C. Use the Lead to Opportunity Business Process Flow.
D. Allow Copilot to summarize key info.
E. Set related record creation to Automatic.
**Answer:** A
**Explanation:**
The correct configuration is to set related record creation to Seller. The case study states that sales leadership requires flexibility in how leads are converted: inside sales need automatic opportunity creation, but field sellers need the option to manually decide whether an opportunity should be created when a lead is qualified. In the new lead qualification experience, Dynamics 365 Sales lets administrators control whether account, contact, and opportunity records are created automatically during lead qualification or whether sellers are prompted to choose which related records to create. Microsoft’s lead qualification guidance confirms that when automatic creation is not enabled, sellers are prompted to select which records should be created during qualification.
Option B and option E are wrong for field sellers because automatic creation would remove the manual decision point required by the case study.
Option C is relevant to guiding sellers through sales stages, but the existing Lead to Opportunity Business Process Flow does not control whether related records are automatically created when a lead is qualified.
Option D is unrelated because Copilot summaries help sellers review record information; they do not

configure lead conversion behavior. Therefore, the required configuration for field sellers is Seller-controlled related record creation.

References/topics: Lead qualification experience; lead-to-opportunity conversion; related account, contact, and opportunity creation; Dynamics 365 Sales lead management.