Microsoft

AB-210

Accelerating Sales Pipelines with AI in Dynamics 365

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Product Version

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Latest Version: 6.0

Topic 1, AdventureWorks

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 Al-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.
Segment
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 Al admin role.
A sandbox and a production environment must be created. Both of the environments must be enabled for Al 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 Al capacity is always available to sellers.

Question: 1

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.

Question: 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.

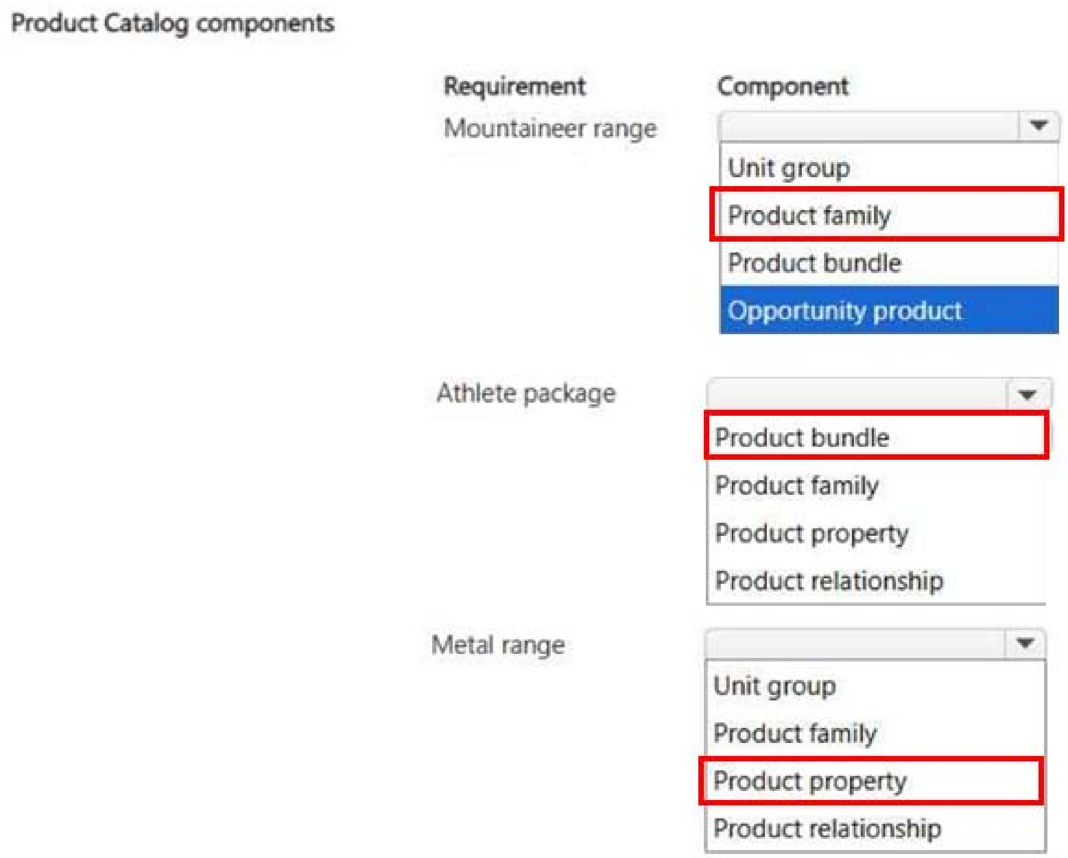
Question: 3

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.

Product Catalog components

Requirement	Component
Mountaineer range	Unit group Product family Product bundle Opportunity product
Athlete package	Product bundle Product family Product property Product relationship
Metal range	Unit group Product family Product property Product relationship

Answer:

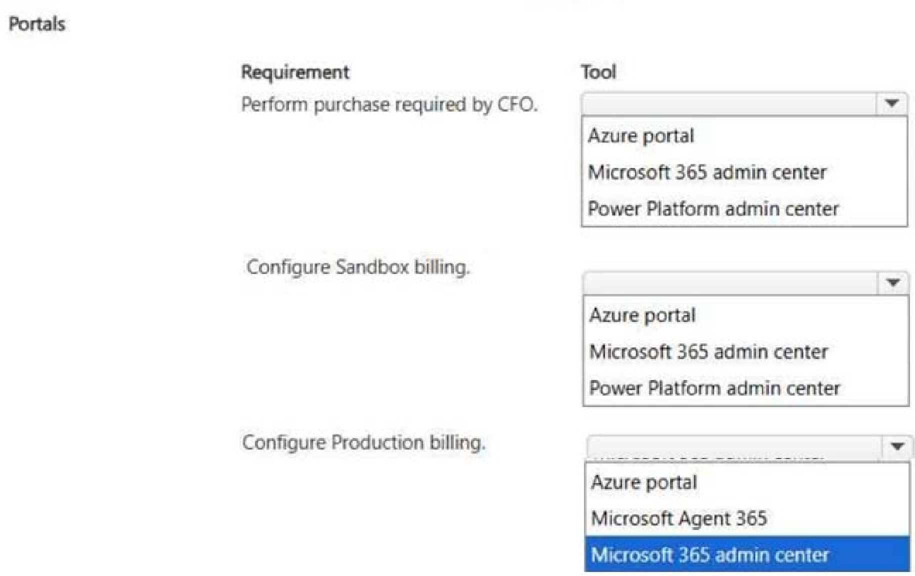


Question: 4

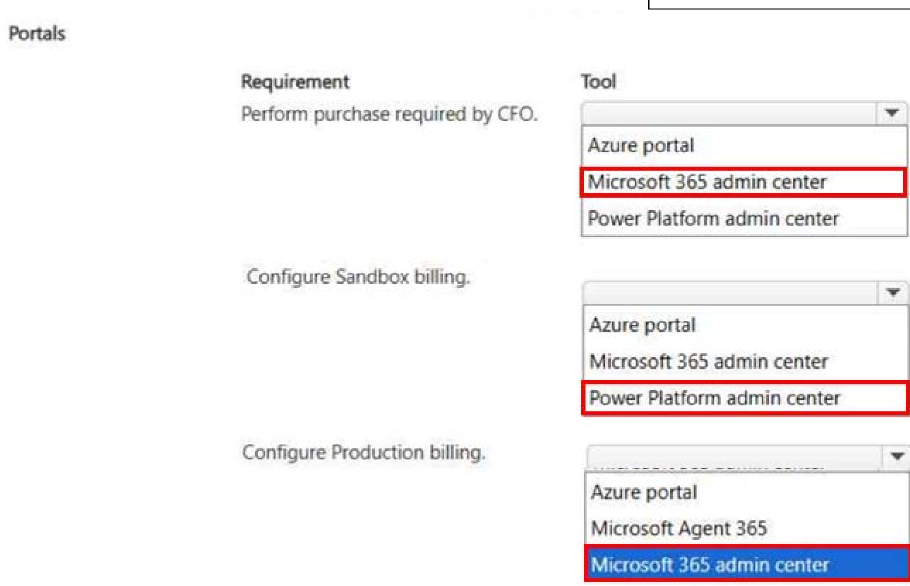
HOTSPOT

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:



Question: 5

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.

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