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QUESTION & ANSWERS
DEMO VERSION
(LIMITED CONTENT)

Sample Questions

QUESTION 1

A sales manager wants sellers to see all email, calls, meetings, and notes related to a record in one chronological view within a Dynamics 365 Sales record. Which feature should you configure?

- A. Sales Accelerator
- B. Timeline [Correct]**
- C. Relationship Assistant
- D. Business Process Flow

Correct Answer: B

Explanation

The Timeline control on a Dynamics 365 record displays a chronological, unified history of activities (emails, calls, appointments, notes) tied to that record. Sales Accelerator (A) is about prioritized work queues/sequences, not activity history. Relationship Assistant (C) surfaces action cards/insights. A Business Process Flow (D) guides a seller through stages, not activity logging.

QUESTION 2

You are preparing to deploy an agent (such as the Sales Qualification Agent) in Dynamics 365 Sales. Before deployment, which two things must you configure?

- A. Capacity and billing/credits for agent usage [Correct]**
- B. A custom Power BI dashboard
- C. Prerequisites such as required licenses and environment settings
- D. A SharePoint document library

Correct Answer: A

Explanation

Deploying any Copilot/agent capability in Dynamics 365 Sales requires confirming licensing/environment prerequisites (C) and configuring capacity, billing, and credit consumption (A), since agent usage draws on metered AI capacity. Power BI (B) and SharePoint (D) are unrelated to agent deployment readiness.

Sample Questions

QUESTION 3

A seller wants an AI agent to help draft outreach emails, schedule follow-ups, and manage next steps on an active opportunity, in addition to just gathering intelligence. Which agent and mode combination is appropriate?

- A. Sales Research Agent
- B. Sales Close Agent – Research
- C. Sales Close Agent – Engage [Correct]**
- D. Sales Qualification Agent – Research-only

Correct Answer: C

Explanation

The Sales Close Agent has two types: Research (gathers deal intelligence/insights only) and Engage (adds action-taking capability like drafting communications and next-step management). The Sales Research Agent (A) is focused purely on gathering intelligence via the research canvas, not taking actions. Option D applies to leads, not opportunities.

QUESTION 4

Your organization wants the Sales Qualification Agent to gather lead information and draft a summary for the seller without contacting the lead directly. Which configuration mode should you use?

- A. Research and engage mode
- B. Autonomous mode
- C. Research-only mode [Correct]**
- D. Manual qualification mode

Correct Answer: C

Explanation

Research-only mode has the agent gather and synthesize lead intelligence for the seller to review, but it does not send outreach. Research and engage mode (A) additionally allows the agent to initiate contact/emails with the lead. "Autonomous" and "Manual qualification" (B, D) aren't the defined configuration modes for this agent.



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