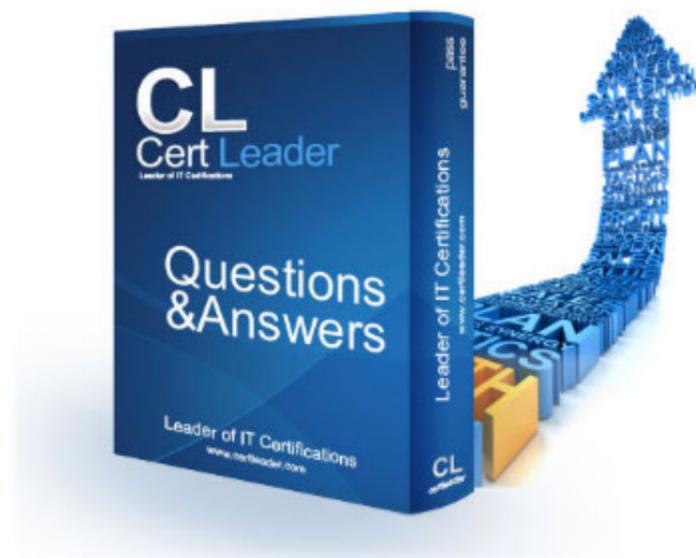


MB2-717 Dumps

Microsoft Dynamics 365 for Sales

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NEW QUESTION 1

An organization uses Microsoft Dynamics 365 for lead management. The organization wants to keep leads warm by contacting them weekly. How should you help your users contact leads on a regular basis by using Relationship Insights?

- A. Create a workflow on leads to remind the owner if there has been no activity for seven days.
- B. Enable the Relationship Assistant on the card options for "No Activity with Lead." and change the "Days before notifying™" to 7.
- C. Enable Email Engagement on the card options for "No Activity with Lead," and change the "Days before notifying™" to 7.
- D. Enable Relationship Insights with Relationship Analytics to show cards for leads with no activity.

Answer: D

NEW QUESTION 2

You are using Microsoft Dynamics 365.

You can find your disqualified leads but are unable to delete the ones you have chosen for deletion.

What do you need to do to delete the leads?

- A. Ask your system administrator to give you the security permissions to delete leads.
- B. Ask your system administrator to give you share permission to delete leads.
- C. Reactivate the leads, then delete them.
- D. Qualify the leads, and then delete them.

Answer: A

NEW QUESTION 3

A customer accepts a quote for 10 products sold by your organization. The customer agrees to pay for half of the total immediately and pay the other half once the products are received.

How do you track this transaction in Microsoft Dynamics 365 so the accounting department will understand the transaction?

- A. Create a new invoice that includes all of the items sold to the customer, and set the invoice to the Partial Fulfilled status reason.
- B. Create a new invoice that includes all of the items sold to the customer, and set the invoice to the Partial Paid status reason.
- C. Create a new invoice that includes half of the items sold to the customer, and set the invoice to the Complete Fulfilled status reason.
- D. Create a new invoice that includes half of the items sold to the customer, and set the invoice to the Complete Paid status reason.

Answer: D

NEW QUESTION 4

Based on a conversation with a potential customer, you think there may be a Lead record for the customer in Microsoft Dynamics 365.

You need to find the disqualified lead so that you can review the activity history on the lead.

Where are two places you can find this information? Each correct answer presents a complete solution.

- A. Disqualified Leads view
- B. Advanced Find
- C. Closed Leads view
- D. Leads Lookup view

Answer: CD

NEW QUESTION 5

An organization uses goals aligned with fiscal periods.

The fiscal periods were never set up and will now need to be aligned with the organization's actual fiscal year and period. What will happen to the goal records that use the old fiscal period when the settings are updated?

- A. Goals will automatically set the date range to match the new fiscal periods.
- B. Goals will become inactive until they are manually aligned with the new fiscal periods.
- C. Fiscal periods cannot be changed when used by active goal
- D. Deactivate the goals while adjusting the fiscal period.
- E. Goals will continue to run using the old fiscal period
- F. A user can manually update the goals if needed.

Answer: A

NEW QUESTION 6

You are a sales manager for your company.

In order to improve sales, you want Microsoft Dynamics 365 to analyze the daily actions and communications of your sales staff. In addition, you would like the analysis data to be used to remind your sales people of upcoming activities and create actionable items to keep them focused.

Which feature of Microsoft Dynamics 365 performs these functions?

- A. Auto Capture
- B. Relationship Assistant
- C. Email Engagement
- D. Site Map Designer

Answer: A

NEW QUESTION 7

After several weeks of negotiation with a customer, the customer decides to purchase ten for them. You need to send a new quote to the customer while keeping records of the requested change. What should you do?

- A. Revise the quote, activate, and send the new quote to the customer.
- B. Close the quote as Los
- C. Create a new quote and send it to the customer.
- D. Create a new Opportunity, and send a new quote to the customer.
- E. Close the Opportunity as Lost create a new quote, and send it to the customer.

Answer: A

NEW QUESTION 8

You have been hired to configure a new Microsoft Dynamics 365 implementation for a company. You need to create a business process flow that accommodates multiple work flows, based on a sen Which action will meet your need?

- A. Add additional multiple linear business process flows.
- B. Add stages to the linear business process flow.
- C. Add branches to the business process flow.
- D. Add multiple steps to the business process flow.

Answer: A

NEW QUESTION 9

You are working with a company to implement Microsoft Dynamics 365 for their sales division. The sales manager wants all sales people to have the ability to be alerted when a recipient opens an email that was sent to them. Which component of Microsoft Dynamics 365 should you use to manage this ability?

- A. Email Engagement
- B. Auto Capture
- C. Relationship Assistant
- D. Folder Level Tracking

Answer: A

NEW QUESTION 10

You are The technical support specialist for a company that utilizes Microsoft Dynamics 365. A new user calls the help desk complaining that every time they try to create a record, they are being denied the ability to The user states that some type of error is displayed as well. What would cause this error?

- A. The user cannot create records using the Outlook client
- B. The user failed to populate at (east one required field).
- C. The user is using Dynamics 365 Business Edition father than Enterprise Edition.
- D. The user cannot input more than 250 characters into a single line of text field.

Answer: A

NEW QUESTION 10

You are a sales support specialist for a company that utilizes Microsoft Dynamics 365. You are going through the many records of their current database and inputting this data into Microsoft Dynamics 365. Which instance below would be created as an Opportunity record in Microsoft Dynamics 365?

- A. a person who calls into the company after receiving a mass mailing advertisement from your company
- B. a person who has prequalified for a mortgage and wants to utilize a real estate agent to look at property
- C. a person who signs a contract to purchase three cases of your product on a quarterly basis for 2 years r
- D. a list of people supplied by a marketing research firm that matches your target market

Answer: D

NEW QUESTION 13

You are using Microsoft Dynamics 365 for sales. Your marketing department has given you a number of illustrated documents that explain how your product is superior to various competitors. You have been tasked with adding this material to Dynamics 365 so the salespeople can use and email the material to their prospects, all from within Dynamics 365. How should you complete this task?

- A. Add the documents to SharePoint and set up the SharePoint integration with Dynamics 365.
- B. Add the documents as sales literature, and associate them with the right competitors.
- C. Add the documents as Email Templates associated with the opportunity entity.
- D. Add the documents as attachments in the notes section for each competitor.

Answer: B

NEW QUESTION 15

You are a sales person working in the Microsoft Dynamics 365 web interface You want to create a view that you can use to segment your active customers by area, based on their physical address. Which three steps must be followed to set up a personal view that you can use without having to create it each time? Each correct answer presents part of the

solution.

- A. Use Advanced Find to search both Accounts and Con
- B. Save your query, and give it a name.
- C. Export the query to Excel, and import it every time ydu need to use it
- D. Use Advanced Find to search for alt Account records that are active.
- E. Use Advanced Find to filter the records, based on the*r ZIP/Post code.

Answer: BC

NEW QUESTION 20

You want to add documents to records in Microsoft Dynamics 365.
You need the ability to search within the documents and associate documents with custom entities.
How should you approach this requirement?

- A. Recommend adding the documents as Word Templates, and associate them with the needed entities.
- B. Recommend setting up SharePoint integration, and enable it for the needed entities.
- C. Recommend adding the documents as Sales Literature
- D. Recommend adding the documents as attachments for the relevant records.

Answer: A

NEW QUESTION 23

You are working on a sales opportunity for a maintenance company. You learn that the company has a new COO.
You need to quickly add this new person to the opportunity.
Which form should you use to capture this information in relationship to the opportunity?

- A. Quick Create Activity form
- B. Quick Create Campaign Response form
- C. Quick Create Lead form
- D. Quick Create Contact form

Answer: B

NEW QUESTION 26

One of your prospects is reviewing a quote you have provided and will be making a decision to either accept or revise your offer.
You need to reflect the prospect's response by setting the quote status.
Which two options can you use to achieve this goal? Each correct answer presents a complete solution.

- A. Fulfilled
- B. Won
- C. Inactive
- D. Draft

Answer: BC

NEW QUESTION 30

You will be attending a conference, and you want to be able to capture information about the prospects you will meet You need to be able to upload the lead information into Microsoft Dynamics 365 with the Import Data Wizard. Which two formats can you use? Each correct answer presents a complete solution.

- A. comma-separated values (.csv)
- B. compressed (.zip)
- C. Excel 97-2003 Spreadsheet (.xls)
- D. Access Database (.accdb)

Answer: AC

NEW QUESTION 32

You are setting up a Product Catalog in Microsoft Dynamics 365 that has a series of products that have similar properties. When added to an Opportunity, the user should be required to make selections on these properties for the products. How should you set this up?

- A. For each of the products, add the Product Properties.
- B. Create a Price List add the Product Properties to the Price List and add the Products as price list items.
- C. Create the Products, then create the Product Family, add the Product Properties to the family, and add the products to the family.
- D. Create the Product Family, add the Product Properties, create the Products, and add the Family Hierarchy in the process.

Answer: C

NEW QUESTION 35

You have recently been hired as a sales assistant for a new employer.
The company sales staff uses Microsoft Dynamics 365, and you must occasionally input data for them.
You want to use the CRM Help Center for assistance to perform these tasks.
Which two help sources are available for you? Each correct answer presents a complete solution.

- A. phone support
- B. training links
- C. online chat

D. community blogs

Answer: BC

NEW QUESTION 39

An organization uses goals for tracking sales and opportunities in Microsoft Dynamics 365.

The organization wants to extend their sales and goals KPIs. and have created a calculated field on Opportunity for Weighted Revenue, based on Est. Revenue and Probability.

Now the organization wants to include weighted revenue in their goals.

Which options meet this customer's needs? Each answer represents a complete solution.

- A. Edit the existing goal metric and change the in-progress value to point to the new weighted revenue held.
- B. Add a new rollup quer
- C. In the query editor, include the weighted revenue fiel
- D. Use the new rollup query in your goals.
- E. Create a new goal metric and name it "Weighted Revenue." Add rollup fields for actual value, and use the weighted revenueheld for the in-progress value.
- F. Edit the existing goal metric for revenue, add a custom rollup field, and point it to the new weighted revenue fiel
- G. Then, adjustthe goal charts to also include the custom rollup field.

Answer: AB

NEW QUESTION 44

You are using Microsoft Dynamics 365 on your tablet

You need to be able to edit the opportunity records using Editable Grids on the tablet What do you need to do to enable Editable Grids on your tablet for opportunities?

- A. You need to enable Editable Grids under Settings in the tablet client.
- B. You need to enable Editable Grids under Options in the web client
- C. You need to ask your system administrator to enable Editable Grids for tablets.
- D. You need to ask your system administrator to enable Editable Grids for tablets.

Answer: A

NEW QUESTION 46

You are working in the Sales module of Microsoft Dynamics 365.

Your manager has asked you to provide a report of Sales Pipeline as quickly as possible. What is the quickest way to provide your manager with the report?

- A. Use one of the built-in reports in Microsoft Dynamics 365.
- B. Create an Advanced Find query of your opportunities, sorted by client.
- C. Create a Static Worksheet and export to Excel.
- D. Create a Dynamic Worksheet and export to Excel.

Answer: B

NEW QUESTION 50

You are setting up a Product Catalog in Microsoft Dynamics 365 for a company selling laptops and accessories.

When a laptop is added to an Opportunity, a travel case should be suggested as an accessory, but a laptop should not be suggested as an accessory to the travel case.

- A. On the product record for the travel case, add a bi-directional relationship of the type Accessory to the laptop product record.
- B. On the product record for the laptop, add a bi-directional relationship of the Type Accessory to the travel case product record.
- C. On the product record for the travel case, add a uni-directional relationship of the type Accessory to the laptop product record.
- D. On the product record for the laptop, add a uni-directional relationship of the type Accessory to the travel case product record.

Answer: A

NEW QUESTION 52

An organization uses goals in Microsoft Dynamics 365 to track sales via opportunities on existing customers.

Customers are grouped into "standard" and "VIP" categories.

You need to create goals that only calculate sales on each account flagged as a "VIP" customer.

Which approach should you take?

- A. Create a rollup query on the account entity, and add a query that only includes accounts flagged as VIP.
- B. Create a rollup query on the opportunity, and add a query that only includes opportunities related to accounts flagged as VIP.
- C. Create a goal metric and specify it to only calculate revenue from accounts flagged as VIP.
- D. Create a rollup field, and set it to only include opportunities related to active accounts flagged as VIP.

Answer: C

NEW QUESTION 53

You are using Microsoft Dynamics 365 to track competitors.

A user has closed an opportunity as lost but the user forgot to add the correct competitor in the process.

How should you instruct the user to ensure the correct competitor is tracked?

- A. Ask the user to open the opportunity, close record associated with the opportunity, and add the competitor.
- B. Ask the user to reopen the opportunity, and add the competitor association directly to the opportunity.
- C. Ask the user to reopen the opportunity, repeat the close process, and add the competitor during this process.

D. Ask the user to change the competitor association on the opportunity record.

Answer: A

NEW QUESTION 55

You receive an email from a person who was referred to your organization by a third party.

You track the email and create a Lead for the prospect. After a few emails exchanged between you and the prospect, you realize that the service they want is not a service your company offers.

How do you capture this information in Microsoft Dynamics 365?

- A. Disqualify the Lead.
- B. Close the Lead as Lost.
- C. Untrack the emails exchanged with the prospect.
- D. Qualify the Lead.
- E. Close the Opportunity as Lost.

Answer: C

NEW QUESTION 60

The bank you work for had a booth at a trade show where they collected leads for people interested in getting a loan with the bank. You are sent a .csv file with 100 leads with whom the bank expects you to follow up.

You need to load these leads in the fastest way possible.

What are two options for doing this in Microsoft Dynamics 365? Each correct answer presents a complete solution.

- A. Use the Import Data feature to upload your data file to Microsoft Dynamics 365.
- B. Convert emails to leads in Outlook by using Microsoft Dynamics 365 for Outlook.
- C. Use the Quick Create New Lead record in Microsoft Dynamics 365.
- D. Convert emails to leads in Outlook by using the Microsoft Dynamics 365 App for Outlook.

Answer: AB

NEW QUESTION 62

You want to use the Export to Excel Templates functional.* of Microsoft Dynamics 365.

What are two benefits of Excel Templates for Microsoft Dynamics 365? Each correct answer presents a complete solution.

- A. You can use the charts that you create in the Excel Templates, and import them as Microsoft Dynamics 365 charts.
- B. You can use Microsoft Dynamics 365 Excel Templates without any specific security role setting.
- C. You can import your Excel templates into Dynamics 365, and share them with other people in your organization.
- D. You can create charts, tables, and sheets to analyze your opportunities.

Answer: AD

NEW QUESTION 67

As your company grows, you need a way to capture the relationship between the people that you know and the organizations they currently work for.

How are these details tracked in a default configuration of Microsoft Dynamics 365?

- A. Many accounts can be associated with many contacts.
- B. Multiple company records can be selected on the company field inside contact records.
- C. One account can be associated with many contacts.
- D. One account can be associated with only one contact.

Answer: A

NEW QUESTION 72

An organization uses goals in a hierarchy with parent and child goals in Microsoft Dynamics 365.

A sales manager leaves the organization and will not be replaced. The sales manager's goal has 10 child goals under it.

You want to keep the child goals while removing the sales manager's parent goal from the system.

What action should you take?

- A. Deactivate the parent goal.
- B. Delete the parent goal.
- C. The 10 child goals will not be affected.
- D. Recreate the 10 child goals without the parent goal.
- E. Then, delete the old parent and child goals.
- F. In each of the 10 child goals, clear the parent goal field and then delete the parent goal.

Answer: D

NEW QUESTION 74

An organization is using the Relationship Assistant in Microsoft Dynamics 365.

A small minority of their users need to only see the Email Cards from Exchange. The rest of the cards are in their way, prohibiting them from properly using the feature to work with their email in Microsoft Dynamics 365.

How should you help this group of users?

- A. Create a Business Unit for the users, and configure the Relationship Assistant for that group to only display Email Cards from Exchange.
- B. For the small group of users, configure their security roles to have no read privileges on the Action Card entity.
- C. Instruct the users to access their personal settings for the Relationship Assistant and turn off the cards they do not wish to see.

D. Turn off all card notifications for all users except the Email Cards from Exchange.

Answer: A

NEW QUESTION 78

You are a solutions architect for a sales organization that uses Microsoft Dynamics 365. The company has just acquired their first international client. Which two configuration tasks will have to be made in order to accommodate the currency exchange between the two organizations? Each answer represents part of the solution.

- A. Assign the new customer a base currency.
- B. A system currency must be added.
- C. Assign the new customer a default currency.
- D. A custom currency must be added.

Answer: AB

NEW QUESTION 82

You are a salesperson using Microsoft Dynamics 365. You need to create a quote for services to be offered to one of your customers. You have selected a potential customer and saved the quote record. What should you add to the quote?

- A. Add Service Activities.
- B. Add Price Lists.
- C. Add Quote Products as time items.
- D. Add a connection between the Opportunity and the Quote.

Answer: B

NEW QUESTION 84

You are a Sales Manager using Microsoft Dynamics 365. You need to analyze how your sales performance and activities relate to sales of products that happened after the initial order. The sales transactions are stored in an ERP system. Which tool should you use to combine your sales activities with your ERP sales data?

- A. Power BI
- B. Excel Templates
- C. the Report Wizard in Dynamics 365
- D. Charts and Dashboards

Answer: C

NEW QUESTION 85

You are working with a sales division to better manage their sales processes by better utilizing the functionality of Microsoft Dynamics 365. You recommend using Relationship Insights to better analyze customer-interaction data to improve sales efforts. What are two features of Relationship Insights that can be used to accomplish this? Each correct answer presents a complete solution.

- A. Auto Capture
- B. Data Loader Service
- C. Relationship Assistant
- D. Sales Insights

Answer: CD

NEW QUESTION 88

You are using Microsoft Dynamics 365 to sell products in different currencies. The currency exchange rates are updated on a regular basis. You need to anticipate the impact of the exchange rates on your analytics and KPIs. What are all the circumstances in which the money fields are updated according to the current exchange rate in Microsoft Dynamics 365?

- A. When the exchange rate is updated, all active records with the changed currency are updated.
- B. It is updated any time the record is updated in any way.
- C. It is updated when the record is created, a money field is updated, or the status changes.
- D. When the currency is added to a record, the exchange rate is set until the currency field is changed.

Answer: C

NEW QUESTION 91

You need visibility to all of your Opportunities to better analyze the information to decide how best to progress with each. What is unique to a Personal View of Opportunities?

- A. You can share them.
- B. You can export them.
- C. You can view them.
- D. You can use Charts with them.

Answer: C

NEW QUESTION 96

You are using Microsoft Dynamics 365 to track your competitors.

You want to take full advantage of the "Win/Loss" report that is available for competitors. What two steps should your users take to track competitors to get reliable results from this report? Each answer represents a part of the solution.

- A. Track competitors on sales literature.
- B. Track competitors on open opportunities.
- C. Track competitors on opportunities closed as Lost
- D. Track competitors on the products used.

Answer: BC

NEW QUESTION 101

You are a sales executive for a sales organization that uses Microsoft Dynamics 365. You want to create your own personal views within Dynamics 365. How can you perform this task?

- A. Use the Advanced Find tool to create personal views.
- B. Use Global Search to create personal views.
- C. Use the Quick Find tool to create personal views.
- D. Use an Editable Grid to create personal views.

Answer: B

NEW QUESTION 104

You need to create an Opportunity in Microsoft Dynamics 365 to track potential customers requesting information or pricing would lead you to track the activities of a potential sale.

What are three ways to create such an Opportunity? Each correct answer presents a complete solution,

- A. from an email activity
- B. from a Lead
- C. from a Work Order
- D. from a Case
- E. manually

Answer: ADE

NEW QUESTION 109

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