MB2-717 Dumps

Microsoft Dynamics 365 for Sales

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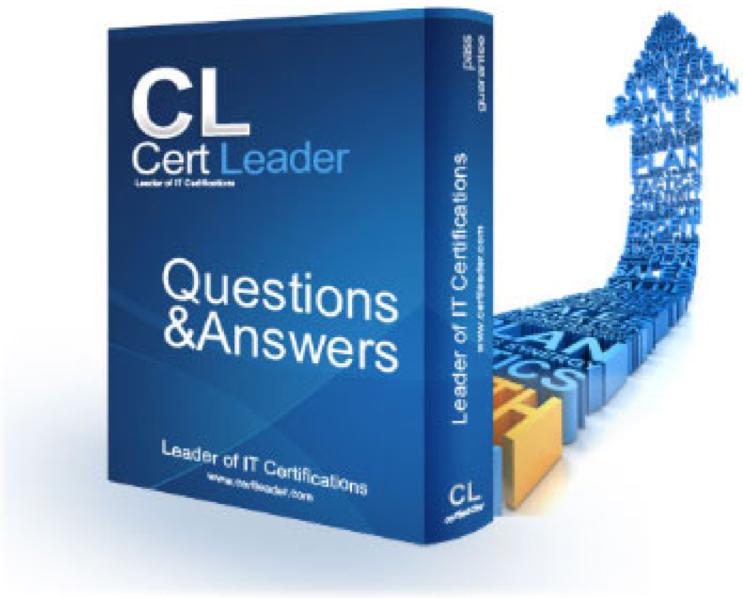

NEW QUESTION 1
You are using Microsoft Dynamics 365.
You can find your disqualified leads but are unable to delete the ones you have chosen for deletion.
What do you need to do to delete the leads?

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 2
You are a sales manager for a large company that is about to implement Microsoft Dynamics 365.
A company called Fabrikam. Inc. has three divisions within the company that purchase services from your firm.
You have created an account record for each of the three divisions and for Fabrikam. Inc. and need to link the records.
How should you set up the records to properly link the record for Fabrikam, Inc. with its three divisions using Microsoft Dynamics 365 account management?

A. Fabrikam, In
B. is a Primary Contact
C. Fabrika
D. In
E. is a Parent account.
F. Fabrika
G. In
H. is a Parent Customer.
I. Fabrikam, In
J. is a Child account.

Answer: B

NEW QUESTION 3
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 4
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 5
You are working with an organization that has extended its reporting in Microsoft Dynamics 365 with Power BL The organization wants to use the Power BI dashboards and tiles inside Dynamics 365. Which two options are available? Each correct answer presents a complete solution.

A. Once Power BI is enabled for the organization, a complete Power BI Dashboard can be added as a personal dashboard.
B. Once Power BI is enabled for the organization, a Power BI tile can be added to a personal dashboard.
C. A System Administrator can add a Power BI Dashboard in Microsoft Dynamics 365 on a system dashboard.
D. A System Administrator can add a Power BI tile in Microsoft Dynamics 365 on a system dashboard.

Answer: BD

NEW QUESTION 6
You are a support specialist in charge of manag.ng a product catalog within Microsoft Dynamics 365 for your company. You are asked to configure Microsoft Dynamics 365 so that management can analyze sales trends by product category. How should you meet this requirement?

A. Create multiple product relationships.
B. Create multiple product families.
C. Create multiple product bundles.
D. Create multiple product catalogs.

Answer: A

NEW QUESTION 7
An organization uses Microsoft Dynamics 365 to track Opportunities and Competitors.
They want to make sure that a competitor is always tracked when it is mentioned in an email from a potential customer regarding an opportunity-How can this be achieved using the fewest steps?

A. Instruct users to always manually associate the competitor when the Competitor Mentioned card is shown by the Relationship Assistant.
B. Configure the Relationship Assistant, and check the Card Option for the Competitor Mentioned card to perform the associated action automatically instead of displaying the card.
C. In the configuration for Auto Capture, enable the option to track competitors automatically when mentioned in emails regarding an opportunity.
D. Create a workflow to scan emails for competitor names, and associate the mentioned competitor to the opportunity.

Answer: A

NEW QUESTION 8
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 9
You are a technical support specialist for your company.
The Company's sales staff are issued a company laptop to use when interfacing with Microsoft Dynamics 365. They need to integrate their smart phones with Microsoft Dynamics 365 as well. Many of their phones, however, do not have a supported web browser.
What should you suggest to meet this sales staffs need?

A. Advise them to run the Microsoft Dynamics 365 web app on their phones.
B. Advise them to use the web client to access Microsoft Dynamics 365 from their phones.
C. Advise them to download the Microsoft Dynamics 365 App from the Office 365 Admin portal.
D. Advise them to download the Microsoft Dynamics 365 App from their phone's store.

Answer: D

NEW QUESTION 10
You are working for a company that is in the process of trying to secure a large contract
As you work with this sales opportunity, you need to manage all the various people involved in the sale, both from the customer and external stakeholder point of view.
You need visibility on the Opportunity record to do this.
Which type of functionality can you use in Microsoft Dynamics 365 to facilitate visibility of those involved?

A. Stakeholders
B. Business Process Flows
C. Contact Preferences
D. Chats

Answer: D

NEW QUESTION 10
You receive an email from a prospect and would like to create a Lead in Microsoft Dynamics 365. You want the email from the prospect connected to the Lead.
How can you accomplish this goal?

A. Navigate to your instance in Microsoft Outlook and create a Lead.
B. Track the email- Manually create a Lead in Microsoft Dynamics 365.
C. Track the emai
D. Convert the email to a Lead record.
E. Create a Lead from the CRM tab in Microsoft Outlook.

Answer: A

NEW QUESTION 11
You are a sales person using Microsoft Dynamics 365.
You need to use the web client to show the outcomes of an Opportunity to your sales team. Which three types of information should you capture on a Resolution Activity related to a
closed Opportunity? Each correct answer presents part of the solution.

A. actual revenue amount from the Opportunity
B. the status of the Opportunity, Won or Lost
C. appointment activities Q
D. phone call activities
E. close date of the Opportunity

Answer: BC

NEW QUESTION 16
You have exchanged a few emails with a lead and it is now evident that your organization will be able to fulfill the customer's need.
You need to proceed to the next step on the sales process and remove the lead from the Open Leads view, but keep it in the system for later review.
What should you do?

A. Delete the Lead.
B. Activate the Lead
C. Close the Lead as Won.
D. Qualify the Lead.

Answer: A

NEW QUESTION 17
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 20
You work for an organization that uses Microsoft Dynamics 365 to quote prices to customers.
The organization wants to incentivize bulk purchases by offering discounts on purchases of larger quantities.
How should you offer bulk discounts?

A. Create a Discount List and associate it with the Price List Item directly.
B. Create a Discount List, and associate it with the Quote directly.
C. Create a Discount List and associate it with the Product directly.
D. Create a Discount List and associate it with the Price List directly.

Answer: C

NEW QUESTION 25
You need to be able to export your data to Excel, edit in Excel, and then, once the edits are completed, update the records in Microsoft Dynamics 365 with your changes.
Which two options require Microsoft Dynamics 365 for Outlook to refresh the data in Microsoft Dynamics 365? Each correct answer presents a complete solution.

A. Export to Static Worksheet
B. Export to Excel Online
C. Export to Dynamic Pivot Table
D. Export to Dynamic Worksheet

Answer: A

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 34
You want to review the status of the sales opportunities you have been working on for the past three months.
Which three system views allow you to review Won and Lost opportunities in Microsoft Dynamics 365? Each correct answer presents a complete solution.

A. Closed Opportunities
B. All Opportunities
C. Top Open Opportunities
D. My Open Opportunities
E. Lost Opportunities

Answer: AD

NEW QUESTION 37
An organization manages their sales process and tracks their competitors on opportunities through Microsoft Dynamics 365. A sales executive requests a report

on how they are performing against each of their competitors. Using only out-of-box capabilities, how should you get this report for the sales executive?

A. On a view of opportunities, run the Pipeline Management Excel Template.
B. Add the Power BI content pack for Sales Managers, and share it with the executive.
C. Run the built-in Competitor Win/Loss report and send it to the sales executive.
D. Create a dashboard with the chart editor and include the competitors' details, and share it with the sates executive.

Answer: C

NEW QUESTION 42
You are working with the Microsoft Dynamics 365 for Phones app.
You have created a new Opportunity to track information that could lead to a sale while visiting a customer and have a Business Process Flow at the Qualify stage.
You need to be able to update the record with information for qualifying the Opportunity. What are three items you can capture on the Opportunity to help you manage this
opportunity through to a sale? Each correct answer presents a complete solution.

A. tracking product returns
B. tracking activities related to the opportunity
C. tracking Invoice adjustment notes
D. tracking competitors
E. tracking the products in which the customer is interested

Answer: AC

NEW QUESTION 43
An organization has many mobile users accessing Microsoft Dynamics 365 via phone or tablet. Microsoft Excel is not installed on the mobile devices.
The organization wants lo enable their users to view detailed analytics with interactive slicers for ad hoc analysis for their customers and opportunities using only the web browser.
Which action should you recommend?

A. Create the detailed analytics as an Excel Template, and instruct the users to download the template.
B. Create the detailed analytics as a Dynamics Worksheet, and distribute it to the users.
C. Create the detailed analytics as a Report and instruct the users to run the report when needed.
D. Create the detailed analytics as an Excel Template, and instruct users to open the template with Excel Online.

Answer: A

NEW QUESTION 44
You are using Opportunities, Quotes, and Orders in Microsoft Dynamics 365 to manage your sales process. You have created multiple revisions for a Quote.
During this process, you have not updated the Opportunity.
The customer now confirms the Quote, and you close it as Won and choose to automatically close the Opportunity at the same time.
Which statements about the Opportunity are true? Each answer represents part of the solution.

A. The Opportunity is closed as Wo
B. and has an Opportunity Close Activity and a Quote Close Activity in the Activities pane.
C. The Actual Revenue on the Opportunity is populated with the amount from the Won Quote.
D. The Opportunity Line Items nave been updated to match the Won Quote.
E. The Opportunity is closed as Wo
F. and has an Opportunity Close Activity in the Activities pane as the only close activity.

Answer: AD

NEW QUESTION 48
You are working with an organization that uses Microsoft Dynamics 365 for sales.
You want to show the sales personnel action carets with reminders for opportunity close dates, activities, reminders for emails that have not been responded to. and statistics on how often sent emails have been opened by recipients.
Which features should you implement in Dynamics 365?

A. Relationship Insights with Auto Capture and Email Engagement
B. Relationship Insights with Relationship Assistant and Email Engagement
C. Relationship Insights with Relationship Analytics and Email Engagement
D. Relationship Insights with Relationship Analytics and Relationship Assistant

Answer: B

NEW QUESTION 49
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 51
You are the sales manager for your company.
You want to trade key performance indicators as well as record activities for all of your clients in order to improve the ratio of, and turn leads into, sales.
Which feature of Microsoft Dynamics 365 will allow you to do this?

A. Relationship Analytics
B. Email Engagement
C. Auto Capture
D. Relationship Assistant

Answer: C

NEW QUESTION 54
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 57
After two months of communicating with a prospect your organization is ready to provide a formal offer for products and to the prospect
You need to ensure the record is correct in Microsoft Dynamics 365. Which item should you create to represent this formal offer?

A. Opportunity
B. Quote
C. Lead
D. Order

Answer: D

NEW QUESTION 62
You are a mortgage broker for a bank.
You need to show the relationship between your Clients and their accountants who are already in the Microsoft Dynamics 365 system.
What should you do?

A. Create a Connection between the Opportunity and the accountant.
B. Add the accountant as a competitor.
C. Tie a Document containing the accountant s business card to the Opportunity,
D. Add a note to the Opportunity with the accountants' information.

Answer: B

NEW QUESTION 64
You are a project manager in charge of implementing Microsoft Dynamics 365 for a sales organization. You are creating a product catalog.
You have created a number of products, yet sales people are complaining that they cannot add these products to any invoices.
What must be done so that the sales people can add these products to their invoices?

A. The products must first be added to an opportunity.
B. The products must first be activated.
C. The products must be placed into draft status.
D. The products must first be included in a quote.

Answer: A

NEW QUESTION 67
An opportunity to partner with one of your competitors on a large project has come up, but you are unable to select the competitor as a customer on the opportunity.
Which two record types can you assign to the competitor to enable you to se4ect them as a customer? Each correct answer presents a complete solution.

A. Lead
B. Contact
C. Account
D. Prospect

Answer: CD

NEW QUESTION 69
You notice that all of your current customers are stored m Microsoft Dynamics 365 as Account records.
You need to create records for other organizations you work with to support your customers. These organizations represent vendors, partners, and distributors.
What record type should you use for these organizations?

A. Account
B. Prospect

C. Organization
D. Company

Answer: A

NEW QUESTION 74
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 76
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 are 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 Lea
E. Close the Opportunity as Lost.

Answer: C

NEW QUESTION 78
One of your custom has sent you an email requesting an invoke for products you have sold and delivered to them. You are getting ready to send the invoice.
You need to quickly the ne« step to be completed in the sa.es process regards this customer in Microsoft Dynamics 365.
Where should you look to see the status of the transaction?

A. Opportunity
B. Quote
C. Invoice
D. Order

Answer: C

NEW QUESTION 83
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 88
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, are share them with other people in your organization.
D. You can create charts, tables, and sheers to analyze your opportunities.

Answer: AD

NEW QUESTION 90
You are working with a sales organization so that they can better utilize Microsoft Dynamics 365 to manage their sales process.
What are two advantages of having the organization s sales professionals utilize Auto Capture? Each correct answer presents a complete solution.

A. They will not need to go into Outlook to track their emails.
B. They can delay sending an email until an appropriate time.
C. They can see untracked emails from Exchange in their activity list
D. They can be notified when an embedded link has been clicked within a sent email-

Answer: AB

NEW QUESTION 94
On an Opportunity. you need to show Stakeholder, Products. Competition, and Sales Teams related to the Opportunity. What ,s automatically set when selecting a related record from within the Opportunity form?

A. the creation date of the related record
B. the Last Date Modified field on the related record
C. the relationship between the related record and the Opportunity
D. the ownership of the related record

Answer: A

NEW QUESTION 97
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 property 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 102
You receive an email from a customer asking to discuss their need for some of the services and products your company offers. You need to track this conversation in Microsoft Dynamics 365 and manage this transaction. Which record should you use to manage this transaction?

A. Quote
B. Order
C. Lead
D. Opportunity

Answer: A

NEW QUESTION 104
You are working with a sates 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 106
You are a sales person for a large automobile dealership.
You created a lead within Microsoft Dynamics 365 for a potential customer who was interested in a current sales event at your dealership. The potential customer selected a new car but was unable to finance it due to bad credit The potential customer has given up for the time being.
How should you modify the record to update it for this sales opportunity?

A. dose as Lost
B. dose as Won
C. dose as Disqualified
D. dose as Cancelled

Answer: B

NEW QUESTION 111
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 116
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 117
You have been working with a potential customer for some company. You need to disqualify the lead in Microsoft Dynamics 365.
time and learn that they are purchasing the product from another When disqualifying the lead, which option should you select?

A. Disqualify > Lost to competitor
B. Disqualify > Lost
C. Disqualify
D. Disqualify > Reject Lead

Answer: C

NEW QUESTION 121
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 124
You are using Price Lists specific to campaigns.
A campaign has recently ended, and you deactivated the associated Price List
How are Opportunities. Quotes, and Orders with the campaign-specific price list affected by the deactivation?

A. Those that already have the deactivated Price List can continue to use the Price List as normal.
B. They will need to be manually updated with new the Price List when applicable.
C. Only Opportunities can continue to work with a deactivated Price Lis
D. Quotes and Orders require an active Price List
E. Orders require an active Price List All other types can continue to work if the Price List was added prior to deactivation.

Answer: D

NEW QUESTION 127
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 132
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