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Microsoft

Exam Questions MB2-717
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
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 3
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 Lost.
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 4
You are a support specialist in charge of managing 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 5
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 6
You are a sales professional for a medium-sized firm. You are entering information into Microsoft Dynamics you organized at a trade show. What type of record should you create for each card?

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

Answer: B

Explanation:
https://community.dynamics.com/enterprise/b/encloud9dynamics365crm/archive/2017/06/13/is-it-a-lead-or-an-opportunity-part-1

NEW QUESTION 7
You are working with the default Opportunity form in Microsoft Dynamics 365. Your sales manager has asked all sales staff to maintain best practices when managing sales and to enter as much information as possible. You need to be able to add additional records and activities to the Opportunity without leaving the form.

What are two types of records you can add from within the Opportunity form? Each correct answer presents a complete solution.

A. Invoices
B. Credit Notes / Adjustment Notes
C. Stakeholders
D. Products

Answer: CD

Explanation: https://crmbook.powerobjects.com/basics/microsoft-dynamics-365-sales-process/opportunities/

NEW QUESTION 8
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 9
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 10
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 11
You are building a sales dashboard for your organization using Microsoft Dynamics 365. You want to make sure that your users get insights into the sales pipeline. Using only the built-in chart editor, which of the following combinations should you choose?

A. a combination of column charts and bar charts, along with a bubble chart to indicate the value of each opportunity and where it is in the pipeline
B. a combination of column charts and bar charts, along with a funnel chart to indicate how much estimated revenue is in each phase of the pipeline
C. a combination of column charts, bar charts, and pie charts, with a tag chart to visualize the different sales stages
D. a combination of column charts and bar charts, along with an area chart to indicate the value of each opportunity and where it is in the pipeline

Answer: C

NEW QUESTION 12
You are a sales manager for a large sales organization that uses Microsoft Dynamics 365. Many of your products have different pricing, based on geographical area. You want your sales people to automatically be assigned the designated price, based on their assigned territory. How can you accomplish this?

A. Assign a product catalog for each territory.
B. Assign a default price list for each territory.
C. Assign a discount list for each territory.
D. Assign a base currency for each territory.

Answer: B

NEW QUESTION 13
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 14
You are a sales executive for a sales organization. You are inputting data to create your Microsoft Dynamics 365 environment.
One of your customers is the purchasing manager at Contoso Ltd and has been ordering from you for over two years after being referred by the VP of Operations of one of your current customers, Fabrikam.
You need to input the required records for this data.
Which three examples represent accurate record configurations? Each correct answer presents a complete solution.

A. Create a lead record for Fabrikam.
B. Create an account record for the purchasing manager at Contoso Ltd.
C. Create a connection record for VP of Operations at Fabrikam.
D. Create an account record for Contoso Ltd.
E. Create a contact record for the purchasing manager at Contoso Ltd.

Answer: ABD

NEW QUESTION 15
You are a sales manager.
You need to have a formal way for your sales staff to trade your competitor information against over the course of the year.
Which three areas in Microsoft Dynamics 365 allow you to track this information? Each correct answer presents a complete solution.

A. Opportunities
B. Tasks
C. Sales literature
D. Cases
E. Products

Answer: BCD

NEW QUESTION 16
On an Opportunity, you need to show Stakeholder, Products, Competition, and Sales Teams related to the Opportunity. What is 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 17
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 18
You are creating Word Templates for a customer using Microsoft Dynamics 365.
The customer needs a Word Template for the account entity and wants to merge data records related to the account.
Which related records can be included in the Word Templates?

A. only records related in N:1 and N:N relationships
B. only records related in N:1 and 1:N relationships
C. records related in 1:
D. N:1 and N:N relationships
E. only records in an N:1 relationship

Answer: A

NEW QUESTION 19
You need to create an Opportunity in Microsoft Dynamics 365 to track potential customers requesting information or pricing, which 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

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