



MB2-717^{Q&As}

Microsoft Dynamics 365 for Sales exam

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QUESTION 1

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, Inc. is a Primary Contact
- B. Fabrikam. Inc. is a Parent account.
- C. Fabrikam. Inc. is a Parent Customer.
- D. Fabrikam, Inc. is a Child account.

Correct Answer: B

QUESTION 2

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

Correct Answer: D

QUESTION 3

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

Correct Answer: D

QUESTION 4

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.

Correct Answer: C

QUESTION 5

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.

Correct Answer: ABD

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