



# MB2-717<sup>Q&As</sup>

Microsoft Dynamics 365 for Sales exam

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### QUESTION 1

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.

Correct Answer: BC

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### QUESTION 2

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

Correct Answer: AC

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### QUESTION 3

After several weeks of negotiation with a customer, the customer decides to purchase ten  
tor 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. Create a new quote and send it to the customer.
- C. Create a new Opportunity, and send a new quote to the customer.
- D. Close the Opportunity as Lost create a new quote, and send it to the customer.

Correct Answer: A

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#### QUESTION 4

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

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#### QUESTION 5

You are a sales manager for your company.

You want your sales people to be able to utilize data on their customers beyond the Microsoft Dynamics 365 application.

With which type of database can Relationship Assistant integrate in order for sales people to better manage their business relationships?

- A. Exchange
- B. Office Delve
- C. SharePoint
- D. SQL

Correct Answer: B

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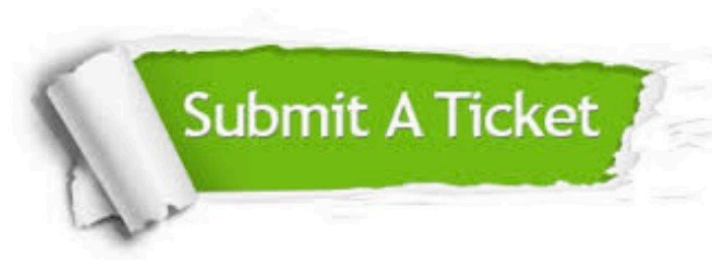
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