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**Exam** : **MB2-717**

**Title** : Microsoft Dynamics 365 for  
Sales

**Vendor** : Microsoft

**Version** : DEMO

**NO.1** 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

**NO.2** 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 List. Quotes and Orders require an active Price List
- D. Orders require an active Price List All other types can continue to work if the Price List was added prior to deactivation.

**Answer:** A

**NO.3** 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 to 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:** C

**NO.4** Your sales manager has asked you to take over management of a sale for a customer that was managed by a previous employee.

You want to make sure everyone who views the Opportunity has full visibility to everything that has happened with the sale to this point and allow other staff to see that you are now managing the sale. How can you meet these needs in Microsoft Dynamics 365?

- A. Email the new management information to everyone in the company.
- B. Delete the Opportunity and recreate it.
- C. Assign the record to yourself.
- D. Assign the record to a team.

**Answer:** D

**NO.5** You are a sales executive for a sales organization that uses Microsoft Dynamics 365. You are doing a global search for the name of a contact that you have not communicated with in over a year.

You are using a partial value search, but the global search is unable to find the contact record.

What is a reason that would prevent global search from finding the record?

- A.** Only an administrator can implement global searches.
- B.** The record for this contact is currently deactivated.
- C.** You cannot use partial values in a global search.
- D.** Global search only searches account and opportunity records.

**Answer:** B

**NO.6** 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 query. In the query editor, include the weighted revenue field. Use the new rollup query in your goals.
- C.** Create a new goal metric and name it "Weighted Revenue." Add rollup fields for actual value, and use the weighted revenue held for the in-progress value.
- D.** Edit the existing goal metric for revenue, add a custom rollup field, and point it to the new weighted revenue field. Then, adjust the goal charts to also include the custom rollup field.

**Answer:** C,D

**NO.7** 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:** C,D

**NO.8** 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:** B

**NO.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

**NO.10** 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

**NO.11** 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:** B

**NO.12** 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:** B,C