



# Microsoft

## MB2-717 Exam

### Microsoft Dynamics 365 for Sales Exam

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## Version: 11.0

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### Question: 1

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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 staff's 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.

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**Answer: D**

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Explanation:

References:

<https://www.microsoft.com/en-us/dynamics/crm-customer-center/install-dynamics-365-for-phones-andtablets.aspx>

aspx

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### Question: 2

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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.

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**Answer: B**

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Explanation:

References:

<http://crmbook.powerobjects.com/basics/searching-and-navigation/understanding-accounts-and-contacts/>

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**Question: 3**

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You have recently been hired as a sales assistant for a new employer.

The company sales staff uses Microsoft Dynamics 365, and you must occasionally input data for them.

You want to use the CRM Help Center for assistance to perform these tasks.

Which two help sources are available for you? Each correct answer presents a complete solution.

- A. phone support
- B. training links
- C. online chat
- D. community blogs

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**Answer: AC**

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Explanation:

References:

<https://mbs.microsoft.com/customersource/northamerica/CRM/support/support-lifecycle/CRMSupport>

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**Question: 4**

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You are the technical support specialist for a company that utilizes Microsoft Dynamics 365.

A new user calls the help desk complaining that every time they try to create a record, they are being denied the ability to save it. The user states that some type of error is displayed as well.

What would cause this error?

- A. The user cannot create records using the Outlook client.
- B. The user failed to populate at least one required field.
- C. The user is using Dynamics 365 Business Edition rather than Enterprise Edition.
- D. The user cannot input more than 250 characters into a single line of text field.

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**Answer: B**

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**Question: 5**

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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 advertising 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.
- D. A list of people supplied by a marketing research firm that matches your target market.

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**Answer: B**

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### Question: 6

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You are a sales professional for an insurance company.

You have been working with a potential customer who was identified in Microsoft Dynamics 365 as an

Opportunity. That customer has just signed a coverage agreement.

How should you now modify the status of the designated Opportunity record?

- A. close the opportunity as Lost
- B. delete the opportunity record, and create a customer record
- C. close the opportunity as Won
- D. delete the opportunity record, and create a contact record

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**Answer: C**

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Explanation:

References:

<https://www.microsoft.com/en-us/dynamics/crm-customer-center/close-an-opportunity-as-won-or-lostsales.aspx>

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### Question: 7

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You are a new sales executive for a company that utilizes Microsoft Dynamics 365.

You have begun tracking your activities in Microsoft Dynamics 365. You have completed the activities for one of your customers.

How will the activity state of the designated tasks be modified to reflect the fulfillment of these activities?

- A. You must manually change the activity state to Canceled.
- B. The activity state will update automatically when the associated opportunity is won.
- C. The activity state will update automatically when the associated sale order is complete.
- D. You must manually change the activity state to Completed.

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**Answer: D**

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Explanation:

References:

<https://www.microsoft.com/en-us/dynamics/crm-customer-center/work-with-activities.aspx>

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**Question: 8**

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You are a sales professional for a medium-sized firm. You are entering information into Microsoft Dynamics 365 from business cards that were collected for a giveaway that you organized at a trade show. What type of record should you create for each card?

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

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**Answer: B**

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**Question: 9**

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You are working with an organization that uses Microsoft Dynamics 365 and Microsoft Office 365. The organization communicates with their customers primarily via email. The organization is struggling with getting emails tracked in Dynamics 365 on the right records, and emails are often not tracked at all. Which feature should you recommend implementing to get visibility of untracked emails inside Dynamics 365 for relevant messages.

- A. Relationship Insights with Email Engagement
- B. Relationship Assistant
- C. Server-Side Synchronization between Microsoft Dynamics 365 and Exchange.
- D. Relationship Insights with Auto Capture

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**Answer: D**

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Explanation:

References:

<https://www.microsoft.com/en-us/dynamics/crm-customer-center/preview-feature-auto-capture.aspx>

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**Question: 10**

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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

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**Answer: CD**

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Explanation:

References:

<https://www.microsoft.com/en-us/dynamics/crm-customer-center/export-to-an-excel-pivottable.aspx>

<https://www.microsoft.com/en-us/dynamics/crm-customer-center/export-to-an-excel-dynamic-worksheet.aspx>

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### Question: 11

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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 Contacts.
- B. Save your query, and give it a name.
- C. Export the query to Excel, and import it every time you need to use it.
- D. Use Advanced Find to search for all Account records that are active.
- E. Use Advanced Find to filter the records, based on their ZIP/Post code.

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**Answer: BDE**

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### Question: 12

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You are working with a company to implement Microsoft Dynamics 365 for their sales division.

The sales manager wants all sales people to have the ability to be alerted when a recipient opens an email that was sent to them,

Which component of Microsoft Dynamics 365 should you use to manage this ability?

- A. Email Engagement
- B. Auto Capture
- C. Relationship Assistant
- D. Folder Level Tracking

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**Answer: A**

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Explanation:

References:

<https://www.microsoft.com/en-us/dynamics/crm-customer-center/preview-feature-email->

[engagement.aspx](#)

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