Microsoft MCSE Certification MB2-717 Exam

- **Vendor: Microsoft**
- **Exam Code: MB2-717**
- **Exam Name: Microsoft Dynamics 365 for Sales**

QUESTION 1
You have been hired to configure a new Microsoft Dynamics 365 implementation for a company. You need to create a business process flow that accommodates multiple work flows, based on a sen. Which action will meet your need?

A. Add additional multiple linear business process flows.
B. Add stages to the linear business process flow.
C. Add branches to the business process flow.
D. Add multiple steps to the business process flow.

Answer: D
Explanation:
https://technet.microsoft.com/en-us/library/dn887193.aspx

QUESTION 2
You are setting up a Product Catalog in Microsoft Dynamics 365 that has a series of products that have similar properties. When added to an Opportunity, the user should be required to make selections on these properties for the products. How should you set this up?

A. For each of the products, add the Product Properties.
B. Create a Price List add the Product Properties to the Price List and add the Products as price list items.
C. Create the Products, then create the Product Family, add the Product Properties to the family, and add the products to the family.
D. Create the Product Family, add the Product Properties, create the Products, and add the Family Hierarchy in the process.

Answer: D

QUESTION 3
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. Choose TWO.)

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

Answer: AC
Explanation:
https://mbs.microsoft.com/customersource/northamerica/CRM/support/support-lifecycle/CRMSupport

QUESTION 4
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. Choose THREE.)

A. Closed Opportunities
B. All Opportunities
C. Top Open Opportunities

D. My Open Opportunities
E. Lost Opportunities

Answer: ADE
Explanation:
https://neilparkhurst.com/2016/07/05/mb2-712-certification-customization-and-configuration-in-microsoft-dynamics-crm-2016-views/

QUESTION 5
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

Answer: C
Explanation:
https://www.microsoft.com/en-us/dynamics/crm-customer-center/close-an-opportunity-as-won-or-lost-sales.aspx

QUESTION 6
An organization manages their sales process and tracks their competitors on opportunities through Microsoft Dynamics 365. A sales executive requests a report on how they are performing against each of their competitors. Using only out-of-box capabilities, how should you get this report for the sales executive?

A. On a view of opportunities, run the Pipeline Management Excel Template.
B. Add the Power BI content pack for Sales Managers, and share it with the executive.
C. Run the built-in Competitor Win/Loss report and send it to the sales executive.
D. Create a dashboard with the chart editor and include the competitors' details, and share it with the sates executive.

Answer: C

QUESTION 7
You have created a personal dashboard in Microsoft Dynamics 365, consisting of personal charts and personal views. You want your team members to be able to fully take advantage of your dashboard. How should you fully share the needed components with the individuals on your team?

A. Share only the views with the team.
B. Share the views with each team member individually.
C. Share the dashboard, views, and charts with the team.
D. Share the dashboard and charts with each team member individually.

Answer: C

QUESTION 8
You are working with the Microsoft Dynamics 365 for Phones app. You have created a new Opportunity to track information that could lead to a sale while visiting a customer and have a

Business Process Flow at the Qualify stage. You need to be able to update the record with information for qualifying the Opportunity. What are three items you can capture on the Opportunity to help you manage this opportunity through to a sale? (Each correct answer presents a complete solution. Choose THREE.)

A. tracking product returns
B. tracking activities related to the opportunity
C. tracking Invoice adjustment notes
D. tracking competitors
E. tracking the products in which the customer is interested

Answer: BDE

QUESTION 9
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

QUESTION 10
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 lo 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: D
Explanation:
https://www.microsoft.com/en-us/dynamics/crm-customer-center/analyze-your-dynamics-365-data-in-excel-online.aspx

QUESTION 11
You are using Opportunities, Quotes, and Orders in Microsoft Dynamics 365 to manage your sales process. You have created multiple revisions for a Quote. During this process, you have not updated the Opportunity. The customer now confirms the Quote, and you close it as Won and choose to automatically close the Opportunity at the same time. Which statements about the Opportunity are true? (Each correct answer presents part of the solution. Choose TWO.)

A. The Opportunity is closed as Won. and has an Opportunity Close Activity and a Quote Close Activity in the Activities pane.

B. The Actual Revenue on the Opportunity is populated with the amount from the Won Quote.
C. The Opportunity Line Items nave been updated to match the Won Quote.
D. The Opportunity is closed as Won. and has an Opportunity Close Activity in the Activities pane as the only close activity.

Answer: CD

QUESTION 12
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: D

QUESTION 13
You are a mortgage broker for a bank. You need to show the relationship between your Clients and their accountants who are already in the Microsoft Dynamics 365 system. What should you do?

A. Create a Connection between the Opportunity and the accountant.
B. Add the accountant as a competitor.
C. Tie a Document containing the accountant s business card to the Opportunity.
D. Add a note to the Opportunity with the accountants' information.

Answer: B

QUESTION 14
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

QUESTION 15
An opportunity to partner with one of your competitors on a large project has come up, but you are unable to select the competitor as a customer on the opportunity. Which two record types can you assign to the competitor to enable you to se4ect them as a customer? (Each correct answer presents a complete solution. Choose TWO.)

A. Lead
B. Contact
C. Account

D. Prospect

Answer: CD

QUESTION 16
You notice that all of your current customers are stored m Microsoft Dynamics 365 as Account records. You need to create records for other organizations you work with to support your customers. These organizations represent vendors, partners, and distributors. What record type should you use for these organizations?

A. Account
B. Prospect
C. Organization
D. Company

Answer: A

QUESTION 17
You are a sales manager who has a large sates team. You want to track when you lose sales to your competitors. Which activity allows you to track your competitors in relationship to a lost opportunity?

A. Resolution activities
B. Phone activities
C. Task activities
D. Email activities

Answer: B

QUESTION 18
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.

Answer: C

QUESTION 19
You are using Microsoft Dynamics 365 to track competitors. A user has closed an opportunity as lost but the user forgot to add the correct competitor in the process. How should you instruct the user to ensure the correct competitor is tracked?

A. Ask the user to open the opportunity, close record associated with the opportunity, and add the competitor.
B. Ask the user to reopen the opportunity, and add the competitor association directly to the opportunity.
C. Ask the user to reopen the opportunity, repeat the close process, and add the competitor during this process.
D. Ask the user to change the competitor association on the opportunity record.

Answer: A

QUESTION 20
You are a sales executive for a sates 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

QUESTION 21
You receive an email from a person who was referred to your organization by a third party. You track the email and create a Lead for the prospect. After a few emails exchanged between you and the prospect you realize that the service they are want is not a service your company offers. How do you capture this information in Microsoft Dynamics 365?

A. Disqualify the Lead.
B. Close the Lead as Lost.
C. Untrack the emails exchanged with the prospect.
D. Qualify the Lead. Close the Opportunity as Lost.

Answer: C

QUESTION 22
One of your custom has sent you an email requesting an invoke for products you have sold and delivered to them. You are getting ready to send the invoice. You need to quickly the next step to be completed in the sa.es process regards this customer in Microsoft Dynamics 365. Where should you look to see the status of the transaction?

A. Opportunity
B. Quote
C. Invoice
D. Order

Answer: C

QUESTION 23
You are a sales executive for a sates 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. Choose THREE.)

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

QUESTION 24
The bank you work for had a booth at a trade show where they collected leads for people interested in getting a loan with the bank. You are sent a .csv file with 100 leads with whom the bank expects you to follow up. You need to load these leads in the fastest way possible. What are two options for doing this in Microsoft Dynamics 365? (Each correct answer presents a complete solution. Choose TWO.)

A. Use the Import Data feature to upload your data file to Microsoft Dynamics 365.
B. Convert emails to leads in Outlook by using Microsoft Dynamics 365 for Outlook.
C. Use the Quick Create New Lead record in Microsoft Dynamics 365.
D. Convert emails to leads in Outlook by using the Microsoft Dynamics 365 App for Outlook.

Answer: AB

QUESTION 25
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. Choose TWO.)

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, are share them with other people in your organization.
D. You can create charts, tables, and sheers to analyze your opportunities.

Answer: AD

QUESTION 26
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

Answer: B

QUESTION 27
You are working with a sales organization so that they can better utilize Microsoft Dynamics 365 to manage their sales process. What are two advantages of having the organization s sales professionals utilize Auto Capture? (Each correct answer presents a complete solution. Choose TWO.)

A. They will not need to go into Outlook to track their emails.
B. They can delay sending an email until an appropriate time.
C. They can see untracked emails from Exchange in their activity list.
D. They can be notified when an embedded link has been clicked within a sent email.

Answer: AB

QUESTION 28
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. Choose THREE.)

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

Answer: BCD

QUESTION 29
As your company grows, you need a way to capture the relationship between the people that you know and the organizations they currently work for. How are these details tracked m a default configuration of Microsoft Dynamics 365?

A. Many accounts can be associated with many contacts.
B. Multiple company records can be selected on the company fiew inside contact records.
C. One account can be associated with many contacts.
D. One account can be associated with only one contact.

Answer: A

QUESTION 30
You are using Microsoft Dynamics 365 to sell products in different currencies. The currency exchange rates are updated on a regular basis. You need to anticipate the impact of the exchange rates on your analytics and KPIs. What are all the circumstances in which the money fields are updated according to the current exchange rate in Microsoft Dynamics 365?

A. When the exchange rate is updated, all active records with the changed currency are updated.
B. It is updated any time the record is updated in any way.
C. It is updated when the record is created, a money field is updated, or the status changes.
D. When the currency is added to a record, the exchange rate is set until the currency field is changed.

Answer: C

QUESTION 31
You need visibility to all of your Opportunities to better analyze the information to decide how best to progress with each. What is unique to a Personal View of Opportunities?

A. You can share them.
B. You can export them.

C. You can view them.
D. You can use Charts with them.

Answer: C

QUESTION 32
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:N, N:1, and N:N relationships
D. only records in an N:1 relationship

Answer: A

QUESTION 33
You are using Microsoft Dynamics 365 to track your competitors. You want to take full advantage of the "Win/Loss" report that is available for competitors. What two steps should your users take to track competitors to get reliable results from this report? (Each correct answer presents part of the solution. Choose TWO.)

A. Track competitors on sales literature.
B. Track competitors on open opportunities.
C. Track competitors on opportunities closed as Lost.
D. Track competitors on the products used.

Answer: BC

QUESTION 34
You have been working with a potential customer for some company. You need to disqualify the lead in Microsoft Dynamics 365. When disqualifying the lead, which option should you select?

A. Disqualify > Lost to competitor
B. Disqualify > Lost
C. Disqualify
D. Disqualify > Reject Lead

Answer: C

QUESTION 35
You are a sales executive for a sales organization that uses Microsoft Dynamics 365. You want to create your own personal views within Dynamics 365. How can you perform this task?

A. Use the Advanced Find tool to create personal views.
B. Use Global Search to create personal views.
C. Use the Quick Find tool to create personal views.
D. Use an Editable Grid to create personal views.

Answer: B

QUESTION 36
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: D

QUESTION 37
You need to create an Opportunity in Microsoft Dynamics 365 to track potential customers requesting information or pricing 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. Choose THREE.)

A. from an email activity
B. from a Lead
C. from a Work Order
D. from a Case
E. manually

Answer: ADE

QUESTION 38
You have a Dynamics CRM organization. Users in the sales department frequently access the organization from a mobile device. The sales department users need to create CRM email activities from email messages, regardless of how the users access the messages. What are two possible technologies that can be used to achieve the goal? (Each correct answer presents a complete solution. Choose TWO.)

A. The Microsoft Dynamics CRM Web client
B. Dynamics CRM App for Outlook
C. Tracked folders
D. Dynamics CRM for Outlook
E. Dynamics CRM for tablets and Dynamics CRM for phones

Answer: AD

QUESTION 39
Your company uses Dynamics CRM Online and has a Microsoft SharePoint Online deployment. You need to configure server-side integration between CRM Online and SharePoint Online. You enable server-based SharePoint integration. Which additional two actions should you perform? (Each correct answer presents part of the solution. Choose TWO.)

A. Configure a connection to a SharePoint site.
B. Configure the Document Management Settings.
C. Install the Microsoft Office 365 Groups solution.

D. Install the list component.

Answer: AB

QUESTION 40
Your company wants to start tracking when customers make referrals in order to view the customers" influence over time. You have a contact named Contact1. Contact1 refers you to an opportunity for a contact named Contact2. You need to track the referral properly. What should you do?

A. Add Contact1 as the stakeholder of the opportunity.
B. Add an opportunity for Contact1.
C. Add Contact1 to the opportunity.
D. Add a connection to Contact1.

Answer: B

QUESTION 41
You are responsible for managing and tracking goals for your company. You attempt to build a sales goal to track the sales team's wins and losses. You create a new goal and you discover that the fiscal Period option is set to quarters. You need to measure the metrics of the goal on a monthly basis. What should you do?

A. Create the goals by using quarters. Create a report by using a system view.
B. Create the goals by using quarters. Create a personal view that uses a filter.
C. Change the System Settings for the goal.
D. Change the Fiscal Year Settings.

Answer: D

QUESTION 42
You need to identify the default sales business process flow. What should you identify?

A. develop, review, update, close
B. identify, research, close
C. qualify, develop, propose, close
D. qualify, research, review, close

Answer: B

QUESTION 43
You have a lead for a potential business customer with whom your company has never done business. You need to identify which types of records are created automatically when you qualify a lead for the new business customer. Which three record types should you identify? (Each correct answer presents part of the solution. Choose THREE.)

A. opportunity
B. quote
C. contact
D. appointment
E. account

Answer: ABC

QUESTION 44
Your sales department is being restructured. As a result, the sales metrics must be adjusted. Currently, you have three tiers of parent-child goals. Under the new model, you will have only two tiers of goals. There are more than 500 child goals. You delete the middle tier of goals. You need to identify how the deletion will affect the child goals. What should you identify?

A. The child goals will be deleted.
B. The Parent Goal field of the child goals will be cleared.
C. The Parent Goal field of the child goals will be set to the top tier parent goal.
D. The child goals will be canceled.

Answer: B

QUESTION 45
You have an opportunity that was generated from a lead. The opportunity has several associated email, task, and phone call activities. What will occur if you delete the opportunity record?

A. The associated lead record, and email, task, and phone call activities will be deleted.
B. The lead will remain qualified. The associated email, task, and phone call activities will be deleted.
C. The lead will revert to being unqualified. The associated email, task, and phone call activities will be deleted.
D. The lead will revert to being unqualified. The associated email, task, and phone cal. activit.es will be associated to the lead.

Answer: C

QUESTION 46
You need to locate the record of a person named Ben Smith. You are uncertain whether Hen Smith is in Dynamics CRM as a contact. What can you use to locate the record?

A. A system view
B. Quick Find
C. A custom grid
D. Advanced Find
E. A personal view

Answer: E

QUESTION 47
You have a Dynamics CRM organization that uses Microsoft SharePoint for document management. From CRM, you upload a document to a SharePoint library. You need to provide a user named User1 with access to the document. What should you do?

A. Request that a CRM administrator add a role to User1.
B. Request that a CRM administrator assign a license to User1.
C. Request that a SharePoint administrator modify the permissions of the document library.
D. Request that a SharePoint administrator modify the connection between SharePoint and CRM.

Answer: B

QUESTION 48

You need to provide a report that displays information from Dynamics CRM and another cloud application. What should you use?

A. A CRM dashboard
B. Microsoft Power BI
C. A CRM chart
D. Immersive Excel

Answer: C

QUESTION 49
You are creating a new opportunity record. The record for the associated contact does not exist yet. How should you create the associated contact?

A. Close the opportunity form. Create a new contact, and then click Connect.
B. Close the opportunity form. Create a new contact, and then click Assign.
C. From the opportunity, click Quick Create from the navigation bar.
D. From the opportunity, click Contact, select New, and then use the Quick Create form.

Answer: C

QUESTION 50
The sales representatives in your company have individual goals by region. You need to create child goals for each sales representative. You must create one child goal for each region that the sales representative manages. What should you configure on the child goals?

A. a goal metric
B. a Rollup field
C. a Calculated field
D. a rollup query

Answer: D

QUESTION 51
You have a product named Product1 that you add to an opportunity. To win the sale, your manager authorizes you to give a customer special pricing for Product1. You need to ignore the product's list price and to ...... What should you use?

A. the Clone option from the product
B. the Pricing Method option from the list
C. the Override Price option from the opportunity
D. the Product Properties option from the product

Answer: A

QUESTION 52
You have two price lists described as shown in the following table. You create an opportunity that uses Pricelist1. The opportunity contains line items for Product 1 and Product 3. You add a write-in product named Product 5 that has a price of $8. You change the opportunity to use Pricelist2, and then you add Product 2. You need to identify which products are listed in the opportunity. What should you identify?

A. Product 1 with a price of $15
   Product 2 with a price of $20
   Product 3 with a price of $10
   Product 5 with a price of $8
B. Product 1 with a Price of $15
   Product 2 with a price of $20
   Product 5 with a price of $8
   Product 3 removed
C. Product 1 with a price of $10
   Product 2 with a price of $20
   Product 3 with a price of $10
   Product 5 with a price of $8
D. Product 2 with a price of $20
   Product 5 with a price of $8
   Product 1 and Product 3 removed

Answer: A

QUESTION 53
While at the airport, you meet the purchasing manager for a local grocery store chain. The purchasing manager complains about a product. You realize that the grocery store chain might benefit from a product that you sell. Before departing, you exchange business cards. You need to track the information from the business card and the conversation by using Dynamics CRM. Which type of record should you create?

A. task
B. quote
C. lead
D. opportunity

Answer: B

QUESTION 54
You create a personal dashboard that tracks important sales information. Your manager wants all of the users in the company to use the dashboard. You need to recommend a method to make the dashboard available to all of the users. The solution must minimize effort. What should you recommend?

A. Export the definitions of the dashboard components, and then import the components.
B. Ask an administrator to recreate the dashboard as a system dashboard.
C. Ask an administrator to share the dashboard with all of the users.
D. Edit the properties of the dashboard, and then assign the dashboard.

Answer: C

QUESTION 55
You are viewing the results from an Advanced Find search of opportunities. You need to identify which actions you can perform on the records from the view in Advanced Find, which two actions should you identify? (Each correct answer presents a complete solution. Choose TWO.)

A. Export the opportunity records to a Microsoft Word file.
B. Add the opportunities to a marketing list.

C. Perform a mail merge.
D. Export the opportunity records to a Microsoft Excel file.

Answer: CD

QUESTION 56
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 notifyingTM" to 7.
C. Enable Email Engagement on the card options for No Activity with Lead," and change the "Days before notifyingTM" to 7.
D. Enable Relationship Insights with Relationship Analytics to show cards for leads with no activity.

Answer: B
Explanation:
https://www.microsoft.com/en-us/dynamics/crm-customer-center/preview-feature-action-cards-reference.aspx

QUESTION 57
You are using Microsoft Dynamics 365. You can find your disqualified leads but are unable to delete the ones you have chosen for deletion. What do you need to do to delete the leads?

A. Ask your system administrator to give you the security permissions to delete leads.
B. Ask your system administrator to give you share permission to delete leads.
C. Reactivate the leads, then delete them.
D. Qualify the leads, and then delete them.

Answer: A

QUESTION 58
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.

Answer: B

QUESTION 59
A customer accepts a quote for 10 products sold by your organization. The customer agrees to pay for half of the total immediately and pay the other half once the products are received. How do you track this transaction in Microsoft Dynamics 365 so the accounting department will understand the transaction?

A. Create a new invoice that includes all of the items sold to the customer, and set the invoice to the Partial Fulfilled status reason.
B. Create a new invoice that includes all of the items sold to the customer, and set the invoice to the Partial Paid status reason.
C. Create a new invoice that includes half of the items sold to the customer, and set the invoice to the Complete Fulfilled status reason.
D. Create a new invoice that includes half of the items sold to the customer, and set the invoice to the Complete Paid status reason.

Answer: B

QUESTION 60
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. Choose TWO.)

A. Disqualified Leads view
B. Advanced Find view
C. Closed Leads view
D. Leads Lookup view

Answer: BC

QUESTION 61
An organization uses goals aligned with fiscal periods. The fiscal periods were never set up and will now need to be aligned with the organization's actual fiscal year and period. What will happen to the goal records that use the old fiscal period when the settings are updated?

A. Goals will automatically set the date range to match the new fiscal periods.
B. Goals will become inactive until they are manually aligned with the new fiscal periods.
C. Fiscal periods cannot be changed when used by active goals. Deactivate the goals while adjusting the fiscal period.
D. Goals will continue to run using the old fiscal periods. A user can manually update the goals if needed.

Answer: D

QUESTION 62
You are a sales manager for your company. In order to improve sales, you want Microsoft Dynamics 365 to analyze the daily actions and communications of your sales staff. In addition, you would like the analysis data to be used to remind your sales people of upcoming activities and create actionable items to keep them focused. Which feature of Microsoft Dynamics 365 performs these functions?

A. Auto Capture
B. Relationship Assistant
C. Email Engagement
D. Site Map Designer

Answer: B

QUESTION 63
You are working with an organization that has extended its reporting in Microsoft Dynamics 365 with Power BL The organization wants to use the Power BI dashboards and tiles inside Dynamics 365. Which two options are available? (Each correct answer presents a complete solution. Choose TWO.)

A. Once Power BI is enabled for the organization, a complete Power BI Dashboard can be added as a personal dashboard.
B. Once Power BI is enabled for the organization, a Power BI tile can be added to a personal dashboard.
C. A System Administrator can add a Power BI Dashboard in Microsoft Dynamics 365 on a system dashboard.
D. A System Administrator can add a Power BI tile in Microsoft Dynamics 365 on a system dashboard.

Answer: AB

QUESTION 64
You are the sales manager for a company that utilizes Microsoft Dynamics 365. Your sales department offers seasonal pricing on many of its products by using price lists which are then deactivated at the close of each season. Which two outcomes occur as a result of deactivating these price lists? (Each correct answer presents a complete solution. Choose TWO.)

A. The prices are removed from the default price list field for all of the company s products.
B. Any pre-existing opportunities associated with those price lists will continue to use them.
C. Any existing sales transactional records will automatically be deactivated until a new price list is created.
D. Any existing sales transactional records will automatically associate with the default price list.

Answer: AB

QUESTION 65
After several weeks of negotiation with a customer, the customer decides to purchase tentor 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.

Answer: A

QUESTION 66
You have a Dynamics CRM organization. You plan to use folder tracking. You configure server-side synchronization and you enable the Folder-Level Tracking feature. A user named User1 in the sales department reports that email activities are not being generated automatically when email messages are moved to the folders. You need to ensure that the email activities are generated. What should you do?

A. Instruct User1 to create folder tracking rules.
B. Set the mailbox of User1 as a forward mailbox.
C. Install the Microsoft Office 365 Groups solution.
D. Instruct User1 to install Dynamics CRM for Outlook.

Answer: C

QUESTION 67
You receive a call from someone you have never spoken to before. He tells you that he is familiar with one of your products from his work at a previous company and wants to purchase the product for his current company. You need to identify the next step in the sales process. What should you identify?

A. Create a lead, log the phone call, and then qualify the lead.
B. Create a contact and a phone call.
C. Update the quote from the previous company and send the quote to the prospect by email.
D. Create a quote.

Answer: C

QUESTION 68
You have four opportunities to sell a product to customers who are located on the same street. You need to ensure that the opportunities are related. What should you do?

A. Include the same note in all four opportunities.
B. Apply a custom connection role.
C. Include all four opportunities in one goal.
D. Send one email message to which each customer is copied.

Answer: D

QUESTION 69
You open the My Open Opportunities view. You need to export the data in the view, and then import the data so that the existing records are updated. What should you do?

A. Export the data as a dynamic PivotTable.
B. Export the data as a dynamic worksheet.
C. Export the data and select the Make available for re-import option.
D. Export the data as a static worksheet.

Answer: C

QUESTION 70
You have a new policy at your company which states that you must track competitors to whom you lost opportunities. What should you do?

A. From the opportunity, click Close As Lost, and then click OK.
Open the opportunity record, and then specify the competitor.
B. From the opportunity, click Close As Lost, specify the competitor, and then click OK.
C. From the opportunity, click Close As Lost, and then click OK.
Locate the opportunity close activity, and then modify the activity.
D. From the opportunity, specify a competitor, click Close As Lost, and then click OK.

Answer: A

QUESTION 71
You have an opportunity for a customer named Contoso. You are ready to offer a quote. You know that a competing company submitted a quote to Contoso for the same product. You need to track

information about the competing company. What are two possible ways to achieve the goal? (Each correct answer presents a complete solution. Choose TWO.)

A. Add the competitor to the quote.
B. Add the competitor to the account.
C. Add the competitor to the products.
D. Add the competitor to the opportunity.

Answer: AD

QUESTION 72
One of your top-selling products is now available in multiple colors. You need to make the color choices available to sales representatives for use in quotes and orders. What should you do?

A. Update the unit group.
B. Clone the product for each color.
C. Revise the product and update the description.
D. Add a property option set item.

Answer: C

QUESTION 73
You have a Dynamics CRM organization. A manager wants to share data with an external consultant by using a dynamic PivotTable. You need to tell the manager what to do before the external consultant can access the data in the PivotTable. What should you instruct the manager to do first?

A. Add Share access to a security role.
B. Assign a license.
C. Add Append To access to a security role.
D. Assign a view.

Answer: A

QUESTION 74
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: B

QUESTION 75
You are using Opportunities and Quotes to manage your sales process in Microsoft Dynamics 365.

A customer requests quotes tor the same set of products, but from two different price lists for comparison. What should you do in order to respond to this customer's request?

A. Create two Opportunities with different price lists.
   Then create one Quote from each of the Opportunities.
B. Create one Opportunity with one Quote.
   Then have the customer review the quote Before creating another.
C. Create one Opportunity with one Quote.
   Then revise the Quote and add the other price list to the Quote.
D. Create two Quotes from the same Opportunity.
   Then switch the price list on one of the Quotes.

Answer: A

QUESTION 76
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

Answer: A

QUESTION 77
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

QUESTION 78
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. Choose TWO.)

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

Answer: CD

QUESTION 79
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 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 father than Enterprise Edition.
D. The user cannot input more than 250 characters into a single line of text field.

Answer: B

QUESTION 80
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 ...... ?

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.

Answer: D
Explanation:
https://www.microsoft.com/en-us/dynamics/crm-customer-center/work-with-activities.aspx

QUESTION 81
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 advertisement 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

Answer: B

QUESTION 82
You are using Microsoft Dynamics 365 for sales. Your marketing department has given you a number of illustrated documents that explain how your product is superior to various competitors. You have been tasked with adding this material to Dynamics 365 so the salespeople can use and email the material to their prospects, all from within Dynamics 365. How should you complete this task?

A. Add the documents to SharePoint and set up the SharePoint integration with Dynamics 365.
B. Add the documents as sales literature, and associate them with the right competitors.
C. Add the documents as Email Templates associated with the opportunity entity.
D. Add the documents as attachments in the notes section for each competitor.

Answer: B

QUESTION 83
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
Explanation:
https://www.microsoft.com/en-us/dynamics/crm-customer-center/install-dynamics-365-for-phones-and-tablets.aspx

QUESTION 84
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

QUESTION 85
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.

Answer: D

QUESTION 86
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 property 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

QUESTION 87
You are a solutions architect for a sales organization that uses Microsoft Dynamics 365. The company has just acquired their first international client. Which two configuration tasks will have to be made in order to accommodate the currency exchange between the two organizations? (Each correct answer presents part of the solution. Choose TWO.)

A. Assign the new customer a base currency.
B. A system currency must be added.
C. Assign the new customer a default currency.
D. A custom currency must be added.

Answer: AB

QUESTION 88
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 tine items.
D. Add a connection between the Opportunity and the Quote.

Answer: B

QUESTION 89
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

QUESTION 90
You are a Sales Manager using Microsoft Dynamics 365. You need to analyze how your sales performance and activities relate to sales of products that happened after the initial order. The sales transactions are stored in an ERP system. Which tool should you use to combine your sales activities with your ERP sales data?

A. Power BI
B. Excel Templates

C. the Report Wizard in Dynamics 365
D. Charts and Dashboards

Answer: C

QUESTION 91
As your company grows, you need a way to capture the relationship between the people that you know and the organizations they currently work for. How are these details tracked in a default configuration of Microsoft Dynamics 365?

A. Many accounts can be associated with many contacts.
B. Multiple company records can be selected on the company field inside contact records.
C. One account can be associated with many contacts.
D. One account can be associated with only one contact.

Answer: A

QUESTION 92
You are working with a sates division to better manage their sales processes by better utilizing the functionality of Microsoft Dynamics 365. You recommend using Relationship Insights to better analyze customer-interaction data to improve sales efforts. What are two features of Relationship Insights that can be used to accomplish this? (Each correct answer presents a complete solution. Choose TWO.)

A. Auto Capture
B. Data Loader Service
C. Relationship Assistant
D. Sales Insights

Answer: CD

QUESTION 93
You are a sales person for a large automobile dealership. You created a lead within Microsoft Dynamics 365 for a potential customer who was interested in a current sales event at your dealership. The potential customer selected a new car but was unable to finance it due to bad credit. The potential customer has given up for the time being. How should you modify the record to update it for this sales opportunity?

A. dose as Lost
B. dose as Won
C. dose as Disqualified
D. dose as Cancelled

Answer: B

QUESTION 94
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

Answer: A

QUESTION 95
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. Choose THREE.)

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 ZIP/Post code.

Answer: BDE

QUESTION 96
You receive an email from a prospect and would like to create a Lead in Microsoft Dynamics 365. You want the email from the prospect connected to the Lead. How can you accomplish this goal?

A. Navigate to your instance in Microsoft Outlook and create a Lead.
B. Track the email. Manually create a Lead in Microsoft Dynamics 365.
C. Track the email. Convert the email to a Lead record.
D. Create a Lead from the CRM tab in Microsoft Outlook.

Answer: C
Explanation:
https://www.microsoft.com/en-us/dynamics/crm-customer-center/overview-of-tracking-records-in-dynamics-365-for-outlook.aspx

QUESTION 97
You are a sales person using Microsoft Dynamics 365. You need to use the web client to show the outcomes of an Opportunity to your sales team. Which three types of information should you capture on a Resolution Activity related to a closed Opportunity? (Each correct answer presents part of the solution. Choose THREE.)

A. actual revenue amount from the Opportunity
B. the status of the Opportunity, Won or Lost
C. appointment activities
D. phone call activities
E. close date of the Opportunity

Answer: ABE

QUESTION 98
You have received an email from a person you met at a conference you recently attended. The email mentions that their organization might be interested in the services provided by your

organization. You need to create a record for this person in Microsoft Dynamics 365 to be later set to the qualified status by your organization. Which record type can be used to accomplish this goal?

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

Answer: C

QUESTION 99
You have exchanged a few emails with a lead and it is now evident that your organization will be able to fulfill the customer's need. You need to proceed to the next step on the sales process and remove the lead from the Open Leads view, but keep it in the system for later review. What should you do?

A. Delete the Lead
B. Activate the Lead
C. Close the Lead as Won
D. Qualify the Lead

Answer: D

QUESTION 100
You want to add documents to records in Microsoft Dynamics 365. You need the ability to search within the documents and associate documents with custom entities. How should you approach this requirement?

A. Recommend adding the documents as Word Templates, and associate them with the needed entities.
B. Recommend setting up SharePoint integration, and enable it for the needed entities.
C. Recommend adding the documents as Sales Literature.
D. Recommend adding the documents as attachments for the relevant records.

Answer: B

QUESTION 101
......