MB2-717^{Q&As}

Microsoft Dynamics 365 for Sales exam

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QUESTION 1

As a manager, you are only measured on annual goals for your staff, but your sales staff is measured quarterly.

You need to set up goals, meeting the requirements and using a minimum amount of goals without creating new rollup queries.

Which approach should you take?

A. Create quarterly and annual goals for each sales person, with an annual parent goal for you.

B. Create quarterly and annual goals for each sales person, with both a quarterly and annual parent goals for you.

C. Create quarterly goals for each sales person measured, with an annual parent goal for your measurement

D. Create quarterly goals for each sales person, and an annual goal for your opportunities.

Correct Answer: A

QUESTION 2

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.

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

Correct Answer: AC

QUESTION 3

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 ne?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

Correct Answer: C

QUESTION 4

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.

Correct Answer: A

QUESTION 5

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

Correct Answer: A

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