



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

Microsoft Dynamics 365 for Sales exam

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**QUESTION 1**

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.

Correct Answer: B

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**QUESTION 2**

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.

Correct Answer: AB

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**QUESTION 3**

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.



Correct Answer: A

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#### QUESTION 4

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.

Correct Answer: A

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#### QUESTION 5

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

Correct Answer: D

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