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# Microsoft

## MB2-704 PRACTICE EXAM

**Microsoft Dynamics CRM Application**

# Product Question: 89

## Question: 1

You are a sales representative at a trade show.
A trade show attendee leaves a business card at your company's booth.
You need to enter the attendee's information into Microsoft Dynamics CRM for the sales team to qualify.
Which record type should you create?

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

**Answer: D**

Explanation:
Ref:
http://msdn.microsoft.com/en-gb/library/gg328442.aspx

## Question: 2

You own an opportunity but need to allow other users to view and edit it.
What should you do?

A. Create a connection for a team, add the sales team role, and add the connection to the opportunity.
B. Add users to the access team on the opportunity.
C. Add users to the access team template.
D. Create a connection for each user, add the sales team role, and add the connection to the opportunity.

**Answer: B**

Explanation:
Ref:
http://www.magnetismsolutions.com.au/blog/paulnieuwelaar/2013/09/12/configure-access-teams-in-dynamics-crm-2013

## Question: 3

You are adding products to an opportunity.
You want to calculate the estimated revenue based on the products added.
What should you do to enable this function?

A. Set the estimated budget.
B. Configure the exchange rate.
C. Use write-in products.

D. Add a price list

**Answer: C**

## Question: 4

What is the purpose of the business process flow in the opportunity form?

A. To show other users who are collaborating on the opportunity
B. To provide a sales script for the salesperson to use when speaking to a potential customer
C. To show the current stage in the sales lifecycle
D. To enforce entry of mandatory fields

**Answer: C**

Explanation:
Ref:
http://technet.microsoft.com/en-us/library/dn531164.aspx

## Question: 5

You need to ensure that lead qualification is automated and occurs when a field on the Lead Form is set to a certain value.
What should you do?

A. Switch the business process flow to set the status of the lead to qualified when the condition is met.
B. Create a business process flow that automatically sets the status of the lead to qualified when the condition is met.
C. Create a dialog that automatically sets the status of the lead to qualified when the condition is met.
D. Create a workflow that automatically sets the status of the lead to qualified when the condition is met.

**Answer: D**

## Question: 6

A staff member at your client organization sends you an email message, inquiring about a product that the client might buy.
After you track the email message, what should you do?

A. Convert the email message to the opportunity.
B. Convert the email message to an account and contact.
C. Create a quote, and link the email message to the quote.
D. Create an order, and link the email message to the order.

**Answer: A**

## Question: 7

You are creating a goal for the number of phone calls made versus the number of phone calls scheduled.
You need to establish the number of scheduled calls for your organization.

Which value provides this information?

A. In-progress
B. Actual
C. Closed
D. Target

**Answer: A**

Explanation:
Ref:
http://www.magnetismsolutions.com/blog/colinmaitland/2012/12/17/goals-management-in-dynamics-crm-2011-goal-metrics-1

## Question: 8

You want to share a personal chart that you created.
Who can you share your chart with? Each correct answer presents a complete solution. Choose two.

A. Resource group
B. Access team
C. Team
D. User

**Answer: C, D**

## Question: 9

Each member of your sales team must earn an individual sales revenue quota for the year in order to receive a bonus.
You create the goal metric and identify the Metric Type as Amount and the Amount Data Type as Money.
You need to complete the configuration of the goal metric.
What should you do?

A. Add rollup fields.
B. Create goals.
C. Create fiscal years.
D. Create rollup queries.

**Answer: A**

Explanation:
Ref:
http://www.magnetismsolutions.com/blog/colinmaitland/2012/12/17/goals-management-in-dynamics-crm-2011-goal-metrics-1

## Question: 10

You create an Advanced Find view that consists of columns from the account entity.
Which action is possible when customizing the view?

A. Adding columns from related of records
B. Creating three levels of sort criteria
C. Setting the option to filter columns to ensure it displays by default when opening the view
D. Merging two columns into one

**Answer: A**

Explanation:
Ref:
http://technet.microsoft.com/en-us/library/dn509578.aspx#BKMK_ChooseAndConfigureColumns

## Question: 11

You create an opportunity report by using the Report Wizard. The report returns too many records.
You need to reduce the number of records returned by the report.
Which two actions should you perform? Each correct answer presents a complete solution. Choose two.

A. Make the report a personal report.
B. Reduce the number of columns.
C. Designate a top or bottom number.
D. Apply a filter.

**Answer: C, D**

Explanation:
Ref:
http://technet.microsoft.com/en-us/library/dn531099%28v=crm.6%29.aspx

## Question: 12

You need to create a dashboard that will include an external website.
Which component should you add?

A. Quick view
B. Sub-grid
C. IFRAME
D. Web resource

**Answer: C**

Explanation:
Ref:
http://www.xrm.com/aboutus/press/newsletter-12-2013/quick-tip-creating-a-dashboard.aspx

## Question: 13

You create a new entitlement.
What is the initial status of the entitlement?

A. Active
B. Waiting
C. Created
D. Draft

**Answer: D**

## Question: 14

You create a new case that includes a service level agreement (SLA). You place the case on hold because you need to wait for additional information from the customer.
What is the status of the SLA key performance indicator (KPI) instance record related to the case?

A. Failed
B. In progress
C. On hold
D. Paused

**Answer: D**

Explanation:
Ref:
http://www.microsoft.com/en-us/dynamics/crm-customer-center/define-service-level-agreements-slas.aspx

## Question: 15

You create a new service level agreement (SLA) and enter the amount of time that is allowed for it.
You need to send an email message to the user assigned to a case when the time limit of the SLA is about to be exceeded.
Which two actions should you perform? Each correct answer presents part of the solution. Choose two.

A. Configure the Warning Actions on the SLA item record.
B. Specify the Applicable When conditions on the SLA item record.
C. Configure the SLA Item Warning on the SLA item record.
D. Configure the SLA Item Failure on the SLA item record.

**Answer: A, C**

## Question: 16

You create a case and link it to a standard service level agreement (SLA) with the timer configured on the case form.
You need to review the case status and report the information to your manager.
Which piece of information about the time of the case is available?

A. Total time the case is on hold
B. Failure time
C. Warning time
D. Total time the case is in processing

**Answer: B**

Explanation:
Ref:
http://www.microsoft.com/en-us/dynamics/crm-customer-center/define-service-level-agreements-slas.aspx#bkmk_StdVsEnhancedSla

## Question: 17

You need to specify the number of support hours a customer will receive.
What should you create?

A. A service activity
B. A service level agreement (SLA)
C. An entitlement
D. A contract template

**Answer: C**

Explanation:
Ref:
http://www.neudesic.com/blog/crm-entitlements/

## Question: 18

You choose a case from the customer support queue. Your company mandates that all requests with customers be tracked regardless of the outcome.
You call the customer and learn that the case was submitted on your company's customer portal by mistake.
What should you do?

A. Cancel the case.
B. Delete the case.
C. Resolve the case.
D. Reactivate the case.

**Answer: C**

## Question: 19

You work at the support desk for a software company.
When the newest version of a popular app is released, you receive an influx of support requests regarding an issue.
The research and development team identify the issue as a bug and prepare to fix it.
You need to identify existing cases in which this bug was reported and relate them to one another so that they can be closed simultaneously when the bug fix has been released.
What should you do?

A. From the parent case, select create child case for each of the cases that reported the bug.
B. From the active cases view, select all of the cases that are reporting the bug, and then select merge cases.

C. From the child case, select similar cases to find the cases that reported the bug.
D. From the active cases view, select all of the cases that are reporting the bug, and then select associate child cases.

**Answer: B**

Explanation:
Ref:
http://www.microsoft.com/en-us/dynamics/crm-customer-center/merge-similar-cases.aspx

## Question: 20

You are responsible for creating and managing Microsoft Dynamics CRM Knowledge Base templates and articles.
A user wants an image to be added to a Knowledge Base article.
What should you do?

A. Create a web resource, and add it to the Knowledge Base template.
B. Insert the image into the Knowledge Base template.
C. Copy and paste the image into the Knowledge Base article.
D. Drag and drop the image onto the Knowledge Base article.

**Answer: A**

## Question: 21

You are the customer service manager of a call center and are performing a daily review of your team's cases. A case record owned by a member of your team has a flag in the research stage of the business process flow.
What does this indicate about the case?

A. The user is finished with that stage.
B. The case is at this stage.
C. The case is ready to close.
D. There is a required field at this stage.

**Answer: B**

Explanation:
Ref:
http://crmmongrel.blogspot.co.uk/2013/10/business-process-flows-in-dynamics-crm.html

## Question: 22

Two active case records are related to the same issue but have nothing else in common.
Your manager asks you to make an association between the records.
What should you do?

A. Merge the two case records.
B. Reference the case ID of the other case in the case ID field of each case.
C. Add one case to the sub-grid on the other case for similar cases.
D. Reference the case ID of the other case in the notes field of each case.

**Answer: C**

## Question: 23

You create a new user.
Which record will Microsoft Dynamics CRM automatically create for the user?

A. Queue
B. Account
C. Contact
D. Team

**Answer: A**

## Question: 24

You create a chart on your personal dashboard. The chart displays the service technician's monthly goals for case resolution.
You need to make this chart available on another dashboard.
What should you do?

A. In the other dashboard, select the existing chart.
B. Export the chart. Import the chart into Charts under the case entity. Go to the dashboard entity, and add the chart to the dashboard.
C. Share the chart from your personal dashboard to the case entity, and add the chart to the system service dashboard.
D. Share the chart from your personal dashboard to the system service dashboard.

**Answer: B**

## Question: 25

You are the team lead in a large call center.
You want to know the originating source for the majority of your team's cases.
You need a report that includes the following information:
The number of cases each of your team members owns by Origin (Phone, Email, Web)
The percentage of cases owned as a proportion of total cases by Origin
Which report should you use?

A. Service Analysis Report
B. Customer Service Maintenance Report
C. Neglected Cases
D. Case Summary Table

**Answer: D**

Explanation:
Ref:

http://www.microsoft.com/en-us/dynamics/crm-customer-center/case-summary-table-report.aspx

## Question: 26

You need a dashboard that shows your cases only.
Which dashboard should you use?

A. Customer Service Operations
B. Customer Service Representative
C. Customer Service Performance
D. Sales Performance Dashboard

**Answer: B**

## Question: 27

You create a personal dashboard to help manage your service cases.
You need to make the dashboard available to your coworker.
What should you do?

A. Share the dashboard with your coworker.
B. Schedule the Dashboard to be Emailed as a Report.
C. Export the Dashboard to Excel, and share the Excel Workbook.
D. Copy and assign the dashboard as a system dashboard.

**Answer: A**

## Question: 28

You are the service desk manager for a large engineering firm. You want to track how many cases are resolved each month by each individual service technician.
Which three items in Microsoft Dynamics CRM do you need to configure? Each correct answer presents part of the solution. Choose three.

A. Goal metric
B. Goal
C. Rollup field
D. Target
E. Parent goal

**Answer: A, B, C**

## Question: 29

Employees in your organization create opportunities in Microsoft Dynamics CRM by using various currencies.
You need a report that uses the company's base currency to show the value of all open opportunities.
What should you do?

A. Create a report that displays the organization's base currency value for each opportunity.

B. Add a field to the opportunity entity to convert and store the base currency value for each one, and create a report to show the opportunities with the base value.
C. Create a report that converts the value of each open opportunity to the organization's base currency.
D. Export all open opportunities to Microsoft Excel, and add a formula that converts the value of each opportunity to the organization's base currency.

**Answer: A**

## Question: 30

You want to use Microsoft Dynamics CRM to compile a repository of competitor information for your sales team.
You create a competitor record and enter your competitor's strengths and weaknesses.
Which two items can you directly associate with the competitor? Each correct answer presents a complete solution.
Choose two.

A. Sales literature
B. Price lists
C. Accounts
D. Products

**Answer: A, D**

Explanation:
Ref:
http://msdn.microsoft.com/en-gb/library/gg334641(v=crm.6).aspx

## Question: 31

You configure a connection to Microsoft Social Listening but cannot see social insights data in Microsoft Dynamics CRM.
What should you do to make social insights visible in Dynamics CRM?

A. Ensure that each of your social listening search topics are assigned a category.
B. Configure social listening search topics and visuals.
C. In system settings, change the default setting for the Disable Social Engagement option.
D. Select the Reset Social Insights option to refresh the social insights data.

**Answer: B**

Explanation:
Ref:
http://technet.microsoft.com/en-us/library/dn659847(v=crm.6).aspx

## Question: 32

Your customer wants to purchase 1,000 units of your best-selling product.
Which type of record in Microsoft Dynamics CRM should you create?

A. Quote

B. Order
C. Opportunity
D. Invoice

**Answer: A**

Explanation:
Ref:
http://msdn.microsoft.com/en-gb/library/gg328015(v=crm.6).aspx

## Question: 33

You implement Microsoft Social Listening and connect it to your Microsoft Dynamics CRM organization.
In which two locations within Dynamics CRM can you access social insights information? Each correct answer presents a complete solution. Choose two.

A. Dashboards
B. Advanced find
C. Reports
D. Entity forms

**Answer: A, D**

Explanation:
Ref:
http://technet.microsoft.com/en-us/library/dn659847(v=crm.6).aspx

## Question: 34

You want to track your interactions with an organization. Which type of customer record should you create?

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

**Answer: B**

Explanation:
Ref:
http://msdn.microsoft.com/en-gb/library/gg309704.aspx

## Question: 35

Your customer requests that deliveries be made on Thursdays only.
You need to configure Microsoft Dynamics CRM to meet this requirement.
What should you create?

A. A new site with a weekly schedule for Thursdays only

B. A new resource group linked to the service for the customer
C. Service preferences on the customer record
D. A business closure for every day except Thursday

**Answer: C**

## Question: 36

You create five new resources for various workers, each with a capacity of one. You create three new trucks in the facilities/equipment form, each with a capacity of two.
Next, you create a new service and add a selection rule to include one from any site. You add a resource to the selection rule for one worker and a second resource for one truck. You then create one new service activity and use the schedule function to find available time slots.
You need to identify which resources are available for scheduling.
What should you identify?

A. One resource is available for the worker, and two resources are available for the truck.
B. Five resources are available for the worker, or three resources are available for the truck.
C. One resource is available for the worker, and one resource is available for the truck.
D. Five resources are available for the worker, or one resource is available for the truck.

**Answer: B**

Explanation: The selection rule has a quantity of ONE. Therefore we can only select (any) one worker OR (any) one truck.

## Question: 37

You view the service calendar with the resource view applied.
You notice a box with the number two in it.
What does this information identify?

A. The service activities need to be scheduled,
B. The resources are assigned to the same service activity.
C. The service activity was rescheduled twice.
D. The service activities on the schedule are conflicting.

**Answer: D**

## Question: 38

You are implementing Microsoft Dynamics CRM. Your company delivers training for customers on various topics. Not all trainers are capable of delivering all training classes.
You need to ensure that each training service is associated with the required resource.
What should you create?

A. Selection rules
B. Service activities
C. Resource groups

D. Capabilities

**Answer: A**

Explanation:
Ref:
http://www.powerobjects.com/blog/2010/07/30/service-scheduling-in-dynamics-crm-part-1/

## Question: 39

An employee who you manage requests one week of paid vacation.
You need to ensure that no work is assigned to this employee during that week.
What should you create?

A. A service schedule
B. A service restriction
C. A time off record
D. A new weekly schedule

**Answer: C**

Explanation:
Ref:
http://www.microsoft.com/en-US/dynamics/crm-customer-center/schedule-time-off.aspx

## Question: 40

You send a quote to a customer, who accepts the quote.
You need to complete the sale and collect payment.
What should you do?

A. Convert the quote to an order, and convert the order to an invoice.
B. Close the quote as invoiced.
C. Close the quote as won.
D. Convert the quote to an invoice, and convert the invoice to an order.

**Answer: A**

Explanation:
Ref:
http://rc.crm.dynamics.com/RC/2011/en-us/online/5.1_CTP/quotesroutingdiagram.aspx

## Question: 41

You currently sell widgets individually.
You now need to configure the product catalog to sell widgets in packs of 12.
What should you configure?

A. Primary unit

B. Unit
C. Base unit
D. Unit group

**Answer: D**

Explanation:
Ref:
http://www.microsoft.com/en-us/dynamics/crm-customer-center/create-a-unit-group-and-add-units-to-that-group.aspx

## Question: 42

A customer with an open opportunity selects one of your company's competitors.
You need to change the status of this opportunity so that the opportunity no longer shows in Open Opportunities.
What should you do?

A. Mark all activities on the opportunity as complete.
B. Close the opportunity as lost.
C. Change the estimated revenue to zero.
D. Activate all draft quotes related to the opportunity.

**Answer: B**

Explanation:
Ref:
http://www.microsoft.com/en-us/dynamics/crm-customer-center/close-an-opportunity-as-won-or-lost.aspx

## Question: 43

A customer calls and wants to make a purchase.
You need to record the phone call and the purchase in Microsoft Dynamics CRM.
What should you do?

A. Create a phone call activity, convert it to an opportunity, and close the opportunity as won.
B. Create an opportunity, add a phone call activity, and then close the opportunity as won.
C. Create an order, and then add a phone call activity.
D. Create a phone call activity, and convert it to an order.

**Answer: A**

Explanation:
Ref:
http://crmbook.powerobjects.com/basics/activities/converting-activities/

## Question: 44

A customer purchases a widget at retail price. Another customer purchases the same product at wholesale price.
What should you create to enable both customers to pay the correct amount?

A. One retail and one wholesale price list
B. One retail and one wholesale product
C. One retail price list with two product price list items
D. One retail price list and one discount list

**Answer: A**

Explanation:
Ref:
http://msdn.microsoft.com/en-gb/library/gg328015.aspx

## Question: 45

The call center handles many types of support calls. Cases for customers requesting account balance information must be routed to a queue for the accounting department.
You need to set up a queue for these types of requests.
Which two actions should you perform? Each correct answer presents part of the solution. Choose two.

A. Assign a security role to the queue.
B. Choose public as the type.
C. Assign members to the queue.
D. Choose private as the type.

**Answer: C, D**

Explanation:
Ref:
http://blog.customereffective.com/blog/2014/06/dynamics-crm-online-spring-14-whats-new-with-queue.html

## Question: 46

You create a case for a customer who requests assistance.
You need to find a Frequently Asked Questions document in Microsoft Dynamics CRM and email it to the customer.
In which location should you look for the document?

A. Knowledge Base
B. Microsoft SharePoint
C. Sales literature
D. Marketing list

**Answer: A**

Explanation:
Ref:
http://www.microsoft.com/en-us/dynamics/crm-customer-center/use-articles-in-knowledge-base.aspx

## Question: 47

Your organization uses business process flows to help users complete their cases.
You want the stage of a business process flow to automatically change when a field value is set to research complete.
What should you add?

A. Business rule
B. Branch
C. Workflow
D. Conditional step

**Answer: C**

Explanation:
Ref:
http://niiranen.eu/crm/2013/10/getting-your-head-around-dynamics-crm-2013-processes-part-2/

## Question: 48

The service desk frequently receives email requests directly from contacts that are not currently in Microsoft Dynamics CRM.
You need to configure an automatic case creation rule to ensure that these requests are not overlooked.
Which option should you select in the case creation rule?

A. Cases for email from unknown senders
B. Automatic email response to customer on case creation
C. Cases for activities associated with a resolved case
D. Cases if a valid entitlement exists for the customer

**Answer: A**

Explanation:
Ref:
http://www.microsoft.com/en-us/dynamics/crm-customer-center/automatically-create-a-case-from-an-email.aspx

## Question: 49

Your company's support team is handling all inbound requests for support for a new product.
You want to configure Microsoft Dynamics CRM so that phone calls and email messages regarding the new product are held until a team member with expertise on the new product is available. The phone calls and email messages need to be assigned in the order in which they were received.
Which feature should you use?

A. Resolution activities
B. Service level agreements
C. Queues
D. Scheduling modules

**Answer: C**

## Question: 50

A customer can use 80 hours of phone support and 20 hours of email support, according to the agreement you set up with this customer.
You need to configure an entitlement.
What should you do?

A. Create an entitlement with two service level agreements (SLAs) for each type of support.
B. Create an entitlement, and link to two cases for each type of support. OC
C. Create an entitlement, with two entitlement channels for each type of support.
D. Create an entitlement, and link to two templates for each type of support.

**Answer: C**

Explanation:
Ref:
http://inogic.com/blog/2014/06/entitlements-in-dynamics-crm-2013-spring-release/

## Question: 51

You need to configure Microsoft Dynamics CRM to use a special service level agreement (SLA) for selected customers.
Which action should you perform?

A. Select the SLA in the cases for the selected customers.
B. Select the SLA in the entitlements for the selected customers.
C. Select the SLA and then use the Set as Default function.
D. Select the SLA on the customer account for the selected customers.

**Answer: B**

Explanation:
Ref:
http://www.microsoft.com/en-us/dynamics/crm-customer-center/define-service-level-agreements-slas.aspx

## Question: 52

An entitlement for a customer has a status of Active.
You need to make changes to the entitlement.
What should you do before making the changes?

A. Renew the entitlement.
B. Deactivate the entitlement.
C. Click Edit in the Action pane.
D. Cancel the entitlement.

**Answer: B**

Explanation:
Ref:
http://www.microsoft.com/en-us/dynamics/crm-customer-center/create-an-entitlement-to-define-the-support-terms-for-a-customer.aspx

## Question: 53

You plan to bulk import new case records.
You do not want the service level agreement (SLA) to apply to the new cases.
What should you do?

A. Set the Disable the SLAs system option.
B. Pause all SLAs.
C. Set the Ignore SLAs import option.
D. Deactivate all SLAs.

**Answer: D**

Explanation:
Ref:
http://www.microsoft.com/en-us/dynamics/crm-customer-center/disable-or-enable-service-level-agreements-slas-for-cases.aspx

## Question: 54

You need to configure Microsoft Dynamics CRM so that only the authorized contacts associated with an account can call and use the entitlement.
What should you do?

A. Add each contact to the case associated to the entitlement.
B. Configure a contact method on each contact.
C. Add each contact to the entitlement.
D. Mark each contact as Primary.

**Answer: C**

Explanation:
Ref:
http://www.neudesic.com/blog/crm-entitlements/

## Question: 55

Your organization uses territories in Microsoft Dynamics CRM to manage sales.
You need to ensure that all sales managers and sales people are associated with the correct territories.
What should you do?

A. Add a sales manager and the relevant sales people as members to each territory.
B. Add a territory to each sales person's record, and add the sales manager and territory to each opportunity record.
C. Add the relevant sales people to each territory record, and make the sales manager the owner of the territory record.
D. Add a sales manager to each territory record and to each sales person's user record.

**Answer: A**

Explanation:
Ref:
http://technet.microsoft.com/en-us/library/dn531129(v=crm.6).aspx

## Question: 56

You have a potential sale with a prospect that you met at a trade show. You enter the prospect as a lead in Microsoft Dynamics CRM.
How should you move the lead forward to track the potential sale?

A. Enter products into the Lead Form.
B. Close the lead as won.
C. Qualify the lead.
D. Activate the lead.

**Answer: C**

Explanation:
Ref:
http://msdn.microsoft.com/en-gb/library/gg328442.aspx

## Question: 57

You want to aggregate customer feedback from social websites in order to identify buying trends and customer opinions toward your company's product.
Which tool should you use in Microsoft Dynamics CRM?

A. Microsoft Social Listening, in order to monitor social media channels
B. Cases, in order to see and respond to negative social mentions
C. Marketing Campaigns, in order to provide visibility to social feeds
D. Activity feeds, in order to view interactions on the social pane

**Answer: A**

Explanation:
Ref:
http://technet.microsoft.com/en-us/library/dn659847.aspx

## Question: 58

Your company's marketing team attends a conference and collects business cards of attendees who do not already use your services. After the conference, the team enters the information from the cards into Microsoft Dynamics CRM.
You assign the records to the sales team so that the team can decide which products and services align with the attendees' needs.
Which common business scenario in Microsoft Dynamics CRM does this sequence of events depict?

A. Creating contacts
B. Supporting customers
C. Lead qualification

D. Creating quotes

**Answer: C**

## Question: 59

You need to add a product brochure to Microsoft Dynamics CRM so that users can send the brochure via email to potential customers. Which record type should you add the brochure to?

A. Sales literature
B. Competitor
C. Product
D. Marketing list

**Answer: A**

Explanation:
Ref:
http://crmbook.powerobjects.com/basics/microsoft-dynamics-crm-sales-process/working-with-microsoft-dynamics-crm-sales-literature/

## Question: 60

You are the manager for all Microsoft Dynamics CRM Knowledge Base articles that the service management team submits.
A team member submits an article to Knowledge Base.
What should you do to make the article available to the entire organization?

A. Submit it
B. Publish it.
C. Approve it.
D. Draft it.

**Answer: B**

Explanation:
Ref:
http://msdn.microsoft.com/en-gb/library/gg309345.aspx

## Question: 61

You identify and create a new case. Your service team's process requires that you hand the case off to another service representative for resolution by adding the case to the service representative's My Active Cases system view.
You need to ensure that the service representative sees the new case in this view.
Which action should you perform on the case?

A. Switch process
B. Share OC
C. Fellow

D. Assign

**Answer: D**

Explanation:
Ref:
http://www.microsoft.com/en-us/dynamics/crm-customer-center/create-and-manage-a-case.aspx

## Question: 62

You are a customer service representative. You receive an inbound request for support for a product support request.
You need to create a new case to document the request.
What should you do?

A. Use the quick view form to create the case.
B. Create and close a phone call activity, and then convert it to a case.
C. Create a lead, and convert it to a case.
D. Use the quick create form to create a case.

**Answer: D**

## Question: 63

You need to reactivate a case you cancelled two days ago in order to update the description.
In which two Microsoft Dynamics CRM system views will you find the case? Each correct answer presents a complete solution. Choose two.

A. Recent Cases
B. Active Cases
C. Cases Opened in the Last 7 days
D. Resolved Cases

**Answer: A, C**

## Question: 64

You complete your work on a queue item and want to allow others to work on it.
What should you do?

A. Save your changes to the queue item.
B. Release the queue item.
C. Route the queue item.
D. Change the action to Work On.

**Answer: B**

Explanation:
Ref:
http://blogs.msdn.com/b/crm/archive/2010/12/20/introduction-to-queues-in-microsoft-dynamics-crm-2011.aspx

## Question: 65

You are viewing the opportunity by status chart and want to see the records that have a status of open.
What should you use on the chart pane?

A. Refresh chart
B. Drill down
C. Advanced Find
D. Export Chart

**Answer: B**

## Question: 66

You are the office manager for a plumbing company. According to customer feedback, technicians are showing up late and are taking a very long time on service calls. You want to research the matter further.
You need a report that displays the number of service activities by owner. Which report should you use?

A. Progress Against Goals report
B. Service Activity Volume report
C. Account Service Overview report
D. Case Summary Table report

**Answer: B**

Explanation:
Ref:
http://www.powerobjects.com/blog/2010/10/12/service-scheduling-part-3-of-3-for-microsoft-dynamics-crm/

## Question: 67

An existing goal tracks the number of cases resolved per month.
You need to enable it to show the number of cases that are still open.
What should you do?

A. Create a new goal, and add it as a child to the existing goal.
B. Create a new goal metric, and add it to the existing goal.
C. Add a new rollup field to the existing goal metric.
D. Add a rollup query to the existing goal.

**Answer: C**

Explanation:
Ref:
http://www.magnetismsolutions.com/blog/colinmaitland/2012/12/17/goals-management-in-dynamics-crm-2011-goal-metrics-1

## Question: 68

You need to ensure that the estimated revenue for your opportunity is calculated correctly based on the most recent territory price list and the associated products.
Which method should you use to configure the opportunity pricing?

A. User Provided
B. Automatic Recalculation
C. System Calculated
D. Current Pricing

**Answer: C**

Explanation:
Ref:
http://crmbook.powerobjects.com/basics/microsoft-dynamics-crm-sales-process/opportunities/

## Question: 69

A customer calls to request a quote for a product.
You need to log the call and create an opportunity for the potential sale.
What should you do?

A. Create a lead, and qualify it to create an opportunity.
B. Create an account and an opportunity.
C. Create a phone call, and convert it to an opportunity.
D. Create a connection, and convert it to an opportunity.

**Answer: C**

Explanation:
Ref:
Explanation:
Ref:
http://crmbook.powerobjects.com/basics/activities/converting-activities/

## Question: 70

You are a marketing specialist. You receive an email message from a prospective client who was referred to your company by a current client.
You need to add the client to Microsoft Dynamics CRM so that a salesperson can follow up with the potential client.
After tracking the email message, what should you do?

A. Convert the email message to an opportunity, and assign it to a salesperson.
B. Convert the email message to a lead, and assign it to a salesperson.
C. Create a task, and set the Regarding field to the existing customer who referred the potential client.
D. Create a new account for the potential client and assign a follow-up phone call activity to a salesperson.

**Answer: B**

Explanation:

Ref:
https://msdn.microsoft.com/en-gb/library/gg328442.aspx

## Question: 71

You lose an active opportunity and close it in Microsoft Dynamics CRM.
What are two results of closing the opportunity? Each correct answer presents part of the solution. Choose two.

A. The opportunity is removed from the list of active opportunities.
B. Notes and attachments associated with the opportunity are saved for future reference.
C. All activities associated with the opportunity are automatically deactivated.
D. The opportunity cannot be reactivated.

**Answer: A, B**

## Question: 72

Which three items can you add to a closed opportunity? Each correct answer presents a complete solution. Choose three.

A. Competitor
B. Product
C. Task
D. Note
E. Description

**Answer: A, C, D**

## Question: 73

You are implementing Microsoft Dynamics CRM. Your company requires employees to perform warranty repairs at the customer site. Where should the warranty repairs be configured in Dynamics CRM?

A. Services
B. Sites
C. Work centers
D. Resources

**Answer: A**

Explanation:
Ref:
http://www.powerobjects.com/blog/2010/07/30/service-scheduling-in-dynamics-crm-part-1/

## Question: 74

You use the service scheduling feature of Microsoft Dynamics CRM to manage inspection services.
You need to configure Microsoft Dynamics CRM with the following information:
A junior inspector can supervise one inspection at a time.

A senior inspector can supervise two inspections at a time.
Which two actions should you perform? Each correct answer presents part of the solution. Choose two.

A. Create a connection on the resources for the inspectors.
B. Add a selection rule to the inspection service.
C. Configure the capacity on the resources for the inspectors.
D. Create a connection on the resource group that includes the inspectors.

**Answer: B, C**

Explanation:
Ref:
http://www.powerobjects.com/blog/2010/07/30/service-scheduling-in-dynamics-crm-part-1/

## Question: 75

Your company uses trucks to drive to customer sites and perform warranty work. Your company has a policy that each truck should remain in a specific region.
You need to configure Microsoft Dynamics CRM to meet these requirements.
What should you do?

A. Create a territory for each region, a facility/equipment record for each truck, and link each truck to the relevant territory.
B. Create a site for each region, create a facility/equipment record for each truck, and link each truck to the relevant site.
C. Create a site for each region, and then link it to each service that is used to perform the warranty work.
D. Create a territory for each region, and then link it to each service that is used to perform the warranty work.

**Answer: B**

Explanation:
Ref:
http://www.powerobjects.com/blog/2010/07/30/service-scheduling-in-dynamics-crm-part-1/

## Question: 76

You want to create a weekly schedule for a resource
Which two settings should you configure when creating the schedule? Each correct answer presents part of the solution. Choose two.

A. Start time
B. Work hours
C. End time
D. Work days

**Answer: B, D**

Explanation:
Ref:
http://www.microsoft.com/en-us/dynamics/crm-customer-center/set-work-hours-of-a-resource.aspx

## Question: 77

A customer calls to change the date and time of a service activity. You have limited dates, times, and resources available for the customer request.
You need to update the information from the service calendar.
What should you do?

A. Use the reschedule option, and resolve any conflicts.
B. Use the appointment option, and resolve any conflicts.
C. Drag the service activity to the correct date and time on the calendar, and resolve any conflicts.
D. Use the schedule option, and resolve any conflicts.

**Answer: D**

Explanation:
Ref:
http://www.powerobjects.com/blog/2010/09/07/service-scheduling-part-2-in-microsoft-dynamics-crm/

## Question: 78

You create an opportunity view and want to export the fields in the view for further analysis.
You need to ensure the data can be refreshed automatically without requiring the data to be re-exported.
What should you do?

A. Open a view of the records, and export it to a dynamic worksheet.
B. Run a report on the view, select the option to include all applicable records, and then export the results to Microsoft Excel.
C. Run a report on the view, select the option to include all records on all pages, and export the results to Microsoft Excel.
D. Open a view of the records, and export it to a dynamic pivot table.

**Answer: A**

Explanation:
Ref:
http://www.microsoft.com/en-us/dynamics/crm-customer-center/export-to-an-excel-dynamic-worksheet.aspx

## Question: 79

What is required to view a Dynamic Excel report?

A. Have Outlook Client installed.
B. Create the export from a System View.
C. Have system administrator rights.
D. Save the Advanced Find query in Microsoft Dynamics CRM.

**Answer: A**

## Question: 80

Your manager needs an analysis that contains four views and three charts.
Which two actions should you perform? Each correct answer presents a complete solution. Choose two.

A. Create one dashboard.
B. Create a Report Wizard Report.
C. Create an SSRS report.
D. Create two dashboards.

**Answer: C, D**

## Question: 81

You need to use Microsoft Dynamics CRM goals and metrics to measure sales revenue of a specific business line for the upcoming fiscal year.
What should you do?

A. Create a rollup query, filter it for opportunity records in the upcoming fiscal year, and apply it to the goal.
B. Create a goal metric, filter it for opportunity records for that business line, and apply it to the upcoming fiscal year's goal.
C. Create a goal metric, filter it for opportunity records in the upcoming fiscal year, and apply it to the goal.
D. Create a rollup query, filter it for opportunity records for that business line, and apply it to the upcoming fiscal year's goal

**Answer: D**

Explanation:
Ref:
http://www.consultcrm.co.uk/blog/2012/09/goals-dynamics-crm-2011

## Question: 82

You need to create a product in Microsoft Dynamics CRM. Which product catalog component is required?

A. Price list item
B. Unit group
C. Price list
D. Discount list

**Answer: B**

Explanation:
Ref:
http://www.microsoft.com/en-us/dynamics/crm-customer-center/create-a-product.aspx

## Question: 83

You update the exchange rate for a currency.

Which two events will cause an open opportunity to calculate and display the updated value? Each correct answer presents a complete solution. Choose two.

A. Changing the state of the opportunity
B. Updating any money field on the opportunity
C. Adding an activity to the opportunity
D. Updating any field on the opportunity

**Answer: A, B**

Explanation:
Ref:
http://blog.customereffective.com/blog/2014/03/dynamics-crm-multiple-currencies.html

## Question: 84

You create an opportunity and need to add products.
What should you do before adding the opportunity products?

A. Set a price list.
B. Change the revenue setting to user provided.
C. Set estimated revenue.
D. Change the revenue setting to system calculated.

**Answer: A**

Explanation:
Ref:
http://crmbook.powerobjects.com/basics/microsoft-dynamics-crm-sales-process/advanced-sales-processes/

## Question: 85

You are working on a case, but you need to use a different process flow.
What should you do?

A. Use a dialog to switch the business process flow.
B. Manually switch the business process flow.
C. Use a business rule to switch the business process flow.
D. Use a workflow to switch the business process flow.

**Answer: B**

Explanation:
Ref:
https://technet.microsoft.com/en-us/library/dn531164(v=crm.6).aspx

## Question: 86

You are a support technician.

You resolve an issue for a customer. You need to schedule a follow-up with the customer in three weeks, before the next payroll.
What should you do?

A. Create a case for the customer, and add it to a Queue.
B. Schedule an appointment or task from the case to follow up before the customer processes the next payroll.
C. Develop a workflow to reopen the case before the customer processes the next payroll.
D. Create a new case for the customer, and set the resolve by date before the customer processes the next payroll.

**Answer: B**

Explanation:
Ref:
http://www.microsoft.com/en-us/dynamics/crm-customer-center/add-a-phone-call-task-email-or-appointment-activity-to-a-case-or-record.aspx

## Question: 87

Your company's support process has the following two business requirements:
New cases that are marked as high priority automatically move to an escalation stage when first opened.
New cases with no priority move to the research stage.
What should you configure to meet these business requirements?

A. Two business process flows
B. Branching business process flow
C. Real-time workflow process
D. Branching business rules

**Answer: B**

Explanation:
Ref:
https://community.dynamics.com/crm/b/magnetismsolutionscrmblog/archive/2014/09/24/branching-business-process-flows-in-microsoft-dynamics-crm-2015.aspx

## Question: 88

Your customer service team often receives support calls for the same issue from multiple customers. You decide to use the parent-child hierarchy feature so that cases can be related, but the cases must continue to be resolved independently.
You need to configure the parent and child case settings for your organization.
What should you do?

A. Ensure that the cascade closure preference is not set.
B. Choose Don't allow parent case closure until all child cases are closed.
C. Choose Close all child cases when parent case is closed.
D. Include the resolve by attribute in the inherited attributes.

**Answer: B**

Explanation:
Ref:
https://msdn.microsoft.com/en-us/library/dn689053.aspx

## Question: 89

What can be classified by using the subject tree?

A. Opportunities
B. Accounts
C. Leads
D. Cases

**Answer: D**

Explanation:
Ref:
https://msdn.microsoft.com/en-gb/library/gg309616.aspx