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Microsoft

MB2-713 PRACTICE EXAM

Microsoft Dynamics CRM 2016 Sales

Product Questions: 93
Version: 9.1

Question: 1

You create a personal view.
You need to ensure that both you and a coworker can use the view.
What are two possible ways to achieve the goal? Each correct answer presents a complete solution.

A. Email the F   etch xml file.
B. Share the view.
C. Email a link from the Advanced Find ribbon.
D. Assign the view.

Answer: BD

Question: 2

You have B Dynamics CRM organization that uses Microsoft Social Engagement
You need to analyze the sales pipeline and the Social sentiment to watch for social trends that affect sales.
What should you do?

A. Configure a link to CRM in Microsoft Social Engagement, and then build an interactive dashboard.
B. Build a dashboard that has a chart for the pipeline and a widget from Microsoft Social Engagement.
C. Build a multi-stream dashboard that has a global filter.
D. Configure a link to CRM in Microsoft Social Engagement, and then build a personal view.

Answer: A

Question: 3

You have a Dynamic CRM organization that has more than 700 active goals.
At the end of each year, your company reevaluates each goal.
You need to identify which value of the goals must be configured manually.
Which value should you identity?

A. Actual
B. target
C. Rollup Query - Actual
D. In-Progress
E. Rollup Query - In Process

Answer: B

Question: 4

You need to create a goal that will show the previous seven days of activity.
Which two actions should you perform? Each correct answer presents part of the solution.

A. close the goal after seven days.
B. Add a filter
C. Set the Goal period as a Custom Period.
D. Add a rollup field.
E. Add a rollup query.

Answer: AC

Question: 5

You work for a company named » Fabrikam, Inc.
Fabrikam is acquired by a company named Contoso, Ltd. Both companies have different fiscal year ends.
The sales team at Fabrikam will be required to use a new fiscal year end at the end of the current quarter.
The Dynamics CRM administrator at Fabrikam updates the Fiscal Year Settings immediately.
You need to ensure that reports on if>.- goals use the Fabrikam year and until the end of the quartet
What should you do?

A. Run the Align with Fiscal Period action immediately.
B. Recalculate the goals.
C. Run the Align w.th Fiscal Period action after the quarter ends.
D. Create new goals for the old fiscal period.

Answer: A

Question: 6

You have Dynamics CRM organization that has 50,000 contacts in regions around the world.
Your job is to review the records of the contacts from three regions. The contacts in the three regions are managed by different account managers. You work with only one of the regions per day, updating the address information of the contacts in that region.
You need to view only the contacts from a specific region.
What should you do?

A. Follow the contact records.
B. Add access teams.
C. Create a dashboard.
D. Create personal views.

Answer: D

Question: 7

You plan to export sales data that will be used in the annual report of your company. You need to provide a copy of some of the sales data to the company stakeholders. Which format can you use to export the data?

A. Adobe PDF

B. Microsoft Word
C. Microsoft PowerPoint
D. Microsoft Visio

Answer: A

Question: 8

You are reviewing the sales pipeline of your Dynamics CRM organization. You need to identify which type of data is contained in the sales pipeline. What should you identify?

A. the combined estimated revenue of all active quotes
B . the combined estimated revenue of all open leads
C. the combined estimated revenue of all open opportunities
D. the combined estimated revenue of all open orders

Answer: C

Question: 9

You have 20 sales representatives who each has a monthly goal that measures the number of phone calls made to their 10 key customers. The managers of the sale representatives want you to add parent goals that track this activity over the next three weeks for an internal competition.
You need to use a parent goal to track the team score, and child goals to track the individual secures.
Which two of configurations should you perform? Each correct answer presents part of the solution.

A. new child goals that all use the same rollup queries.
B. Change the parent goal of each child goal.
C. Create a parent goal that has a custom period of three weeks from today
D. Change the manager of each child goal
E. Change the goal manager of each child goat.

Answer: CD

Question: 10

You manager needs to view a collection of data records and a chart of the data records simultaneously. What should you instruct the manager to do?

A. Define a view and add a chart
B. Export the Fetch XML. and then import a chart.
C. Run the Report Wizard.
D. Create a personal report.

Answer: C

Question: 11

You need to create a quarterly goal to measure completed phone calls regarding open opportunities. Which three components should you use? Each correct answer presents part of the solution.

A. a calculated field
B. a goal metric that has the Amount metric type
C. a rollup field
D. a rollup query
E. a goal metric that has the Count metric type

Answer: CDE

Question: 12

You are viewing the My Open Opportunities view.
You need to update the Rating field for all of the records that have the field set to warm. Also, you must delete all of the values in the Probability field for all the records.
What are two possible ways to edit the data? Each correct answer presents a complete solution.

A. Export the data as a dynamic worksheet
B. Export the data to a Microsoft Excel static worksheet
C. Open the view in Microsoft Excel Online.
D. Select the records and click Edit.

Answer: CD

Question: 13

You have a Dynamics CHM organization that uses folder tracking.
You have a folder named Customers that is currently being tracked- Customers contains a folder for The main contact named Contact1.
A new email message from Contact1 is delivered to your Inbox.
You need to identity what will occur when you move the message to the Customer1 folder.
What should you identify?

A. An email activity will be created in CRM that has a connection to Customer1 and to Contact1
B. An email act.v.Ty will be created in CRM that has a connection to Contact1 only.
C. An email activity will be created m CRM that has a connection To Customer1 only.
D. An email activity will be created in CRM that has the Set regarding field set to Contact1
E. An email activity will be created in CRM rhat has the Set regarding field Set to Customer1

Answer: D

Question: 14

Your company wants to capture Dynamics CRM-related notes in Microsoft OneNote.
You need to configure integration between OneNote and CRM.
What should you configure before you can configure OneNote integration?

A. Microsoft Yammer integration
B. server-based Microsoft SharePoint integration

C. Microsoft Social Engagement
D. Microsoft Office 365 Groups

Answer: B

Question: 15

Your company wants to integrate the Microsoft Yammer enterprise subscription and the Dynamics CRM organization. The managers at the company are cornered about potential data from CRM being visible to users who do not have a CRM account.
They want to limit which user can see post in CRM.
In Yammer, you can create a private group named CRM Posts, and you connect CRM to the CRM Posts group.
Users report that they fail to see posts in Yammer that are created in CRM.
You need to Identity what prevents the users from seeing the posts
What should you identity?

A. The users are not added to the CRM Posts group in Yammer.
B. The posts are not being shared with the team of the users.
C. The security role assigned to the users does not provide access to yammer posts
D. The users are not following any records.

Answer: B

Question: 16

You have a Dynamics CRM organization that uses Microsoft SharePoint for document management by using server-side synchronization.
You need to identity which SharePoint actions tan be performed directly from CRM.
What should you identify?

A. Modify the settings of the columns in a SharePoint list.
B. View the document version history.
C. Display the documents contained in the SharePoint document library.
D. Create and manage SharePoint content types-

Answer: C

Question: 17

You have a Dynamics CRM organization that uses Microsoft OneNote integration.
A user named User1 enters some information in a OneNote notebook for an account record named Account. User1 owns the record for Account 1.
You need to identify who can open the notebook tor Account1 directly from OneNote.
Who should you identify?

A. all of the users who can view a notebook in CRM
B. only User1
C. all of the users who have Read access to Account1 in CRM
D. all of the users who can add notes ro Account1 in CRM

Answer: B

Question: 18

Your company uses Dynamics CRM Online.
You need to provide Dynamics CRM users with the ability to collaborate on CRM data, meetings, and notes with users who do not have a CRM account.
Which two actions should you perform? Each correct answer presents part of the solution,

A. Install the Microsoft Office 365 Groups solution.
B. Create a Microsoft SharePoint document library.
C. Enable integration with Microsoft OneDrive for Business.
D. Configure Microsoft SharePoint server-based integration.
E. Configure the Microsoft Office 365 Group Settings

Answer: AE

Question: 19

You have a Dynamics CRM organization that uses server-side synchronization to process email.
A manager requests that you create the mailbox records defined as shown in the following table.

Record name	Incoming Email	Outgoing Email	Appointments, Contacts, and Tasks	Is Forward Mailbox
User1	Microsoft Dynamics CRM for Outlook	Microsoft Dynamics CRM for Outlook	Microsoft Dynamics CRM for Outlook	No
User2	Server-Side Synchronization or Email Router	None	Server-Side Synchronization	Yes
User3	Forward Mailbox	Server-Side Synchronization or Email Router	Microsoft Dynamics CRM for Outlook	No
User4	Forward Mailbox	Server-Side Synchronization or Email Router	Server-Side Synchronization	Yes

You need to identify which record will fail to be created.
Which record should you identify?

A. User2
B. User3
C. User1
D. User4

Answer: A

Question: 20

You create a new mailbox record for a user.
You define the synchronization methods for incoming and outgoing email, contacts, tasks, and appointments.
You need to ensure that the mailbox can send and receive email.
Which two actions should you perform? Each answer presents part of the solution.

A. Set the Is forward Mailbox setting to No.
B. Configure the Approve Email setting.
C. Configure the Test & Enable Mailboxes setting.
D. Configure the Apply Default Email Settings setting.
E. Set the Is Forward Mailbox setting to Yes.

Answer: BC

Question: 21

You create an Advanced Find that displays all of the open opportunities containing a specific line item.
You need to edit some of the records returned from the Advanced Find by using immersive Excel.
What should you do first?

A. Click Export to Excel
B. Click Download Fetch XML
C. Save the Advanced Find as a view.
D. Create a Microsoft Excel template.

Answer: C

Question: 22

Your Dynamics CRM organization uses Microsoft Yammer.
You plan in enable integration with Yammer to replace the default CRM activity feeds.
You need to identify which security rights are required to enable the integration.
Which two security rights should you identify? Each correct answer presents part of the solution.

A. Dynamics CRM administrator
B. Dynamics CRM System Customizer
C. Yammer administrator
D. Microsoft SharePoint administrator
E. Microsoft Office 365 administrator

Answer: AC

Question: 23

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

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

Answer: B

Question: 24

You have a recalled product that should no longer be sold.
You need to remove the. Product from the available list of products and to prevent any sales from being processed for the product.
Which two actions should you perform? Each correct answer presents part of the solution.

A. Remove the product from the family hierarchy.
B. Modify the open opportunities.
C. Update the price list.
D. Retire the product.
E. Modify the validity date of the product.

Answer: AB

Question: 25

You have an existing customer named customer1.
You have a new add-on product for an existing product that you sell.
You want to offer the add-on product to a customer who has purchased the existing product already.
You need to track the sales initiative in Dynamics CRM.
What should you do?

A. Update the original opportunity record.
B. Create a new opportunity record for the new offering.
C. Create a sub-account for the new offering.
D. Reopen the original opportunity record.

Answer: B

Question: 26

Your marketing team is promoting a sale that they will announce by using email. The email message will be sent to existing customers who recently purchased similar products and to potential customers from a purchased mailing list.
Any sales made as a result of the sale need to have the pricing applied, the sales must be tracked so that the marketing team can report on the return on investment (ROl) of the initiative.
What are two possible ways to achieve the goal? Each correct answer presents a complete solution.

A. Convert the email activities to leads.
B. Convert the campaign response activities to opportunities.
C. Convert the campaign response activities to leads.
D. Convert the email activities to opportunities.

Answer: BD

Question: 27

You have a Dynamics CRM organization that has several currencies enabled. What occurs when a user creates a record that has a currency field?

A. The currency is based on the sales territory of the user.
B. The currency is based on the location of the user record.
C. The currency is converted into the base currency and is always displayed in the base currency
D. The system default currency is the record default, unless a customer has a default currency

Answer: D

Question: 28

You company employs consultants who bill customers for their time.
You sales team is responsible for selling the consultants time, in addition to selling product licenses.
You need to provide the sales team with the ability to create opportunities, quotes, and invoices for the consultant's time.
What should you create first?

A. a product family
B. a price list
C. a product bundle
D. a unit group

Answer: D

Question: 29

Your company plans to deploy Dynamics CRM.
In the previous sales database, you did not track products
Members of the management team are evaluating whether to use the product catalog in the CRM organization. You need to identify which enhancements to the sales flow can be achieved by using the product catalog. What are two possible enhancements that you can identity? Each correct answer presents a complete solution.

A. inventory management integration
B. automated sales pipeline velocity tracking
C. automated revenue calculation
D. automated quotes, orders, and invoicing

Answer: CD

Question: 30

Your company has a Dynamics CRM organization.
The company plans to use the product catalog.
You need to identify which component must be configured before you can implement the product catalog.

A. product families
B. product
C. price lists
D. unit groups

Answer: C

Question: 31

You need to identify which type of object can be associated to sales territories. Which type of object should you identify?

A. Opportunities
B. Users
C. Leads
D. Facilities
E. Teams

Answer: B

Question: 32

Yon have a Dynamics CRM organization, You have account records for three companies named Company1. Subsidiary 1, and Subsidiary2. Subsidiary 1 has Company1 as a parent account. Subsidiary2 has Subsidiary1 as a parent account. Subsidiary2 has an open opportunity of $S0O,0OO. There are no other open opportunities fof the three companies.
You need to identify what open revenue will be displayed for the companies when you view the hierarchy.
What should you identify?

A. Company1: S5OO.000
Subsidiary1: $0
Subsidiary2: S50O.0OO
B. Company1: $O
Subsidiary1: SO
Subsidiary2: $500,000
C. Company1: $500,000
Subsidiary1: $500.000
Subsidiary2: $500,000
D Company1: $O
Subsidiary1: $500.000
Subsidiary1: $500.000

Answer: C

Question: 33

You work for a hotel chain.
You integrate Dynamics CRM and Microsoft Social Engagement.
You need to identify which sources are available for Microsoft Social Engagement.
What are two possible sources? Each correct answer presents a complete solution.

A. Twitter
B. Facebook
C. Trip Advisor

D. Instagram

Answer: AB

Question: 34

Your product line is expanding rapidly and you sale representatives often are unfamiliar with the full of list of applicable products for a customer. As such, your sales team often misses chance to upsell and sell related accessories. You identify what you can add to the product catalog to support upselling and cross-selling.
What should you identify?

A. a product discount list
B. a product kit
C. a product bundle
D. a product family
E. a unit group

Answer: C

Question: 35

Your company purchases a mailing list of purchasing managers at the companies in you are
a. Your contact the purchasing managers. You gather information about their budget and timelines. You conclude that their companies are a good fit for a product that you sell. You need to advance the sale and provide data for sales pipeline tracking to your sales managers.
What should you do next?
A. Add a lead to a marketing list.
B. Generate a quote.
C. Populate the Develop section of the lead business process flow.
D. Qualify a lead.

Answer: C

Question: 36

You have a quote named Quote1 that was activated and presented to a customer
You plan to take a long leave of absence. In your absence, a user named User2 will take ownership of Quo: You need to transfer ownership of Quote1 to User2.
What should you do?

A. Click Assign and select User2
B. Click Close and instruct User2 to create a new quote.
C. Click Share and select User2
D. Click Email a Link and select User2

Answer: A

Question: 37

You call a potential customer to discuss one of your company's products. During the call, you discover that the potential customer is uninterested in the product. You need to document the conversation and your decision not to pursue the potential customer any further.
What should you do?

A. Detail the conversation in a note and attach the note to a lead.
B. Create a lead, track the activity, and then mark the lead as Disqualified
C. Create an opportunity, track the activity, and then close the opportunity as Lost
D. Detail the conversation in a note and attach the note to an opportunity

Answer: B

Question: 38

You recently visited a trade show and you interacted with many potential customers.
As a vendor al the trade show, you receive a CSV file that contains detailed information about the 643 attendees who showed interest in your products.
You need to efficiently and accurately input this information into Dynamics CRM for future use in the sales process.
Which method should you use?

A. Import the details as new activates.
B. Import the details as new leads.
C. Update opportunities to reflect new prospects.
D. Import the information as part of a solution file.

Answer: B

Question: 39

Your company uses seminars and trade shows as its two primary methods to generate leads. You want to analyze which method generates the most leads.
You generate a report that displays the number leads generated from trade shows and the number of leads generated from seminars.
Which report should you use?

A. Sales Pipeline
B. Neglected Leads
C. Lead Source Effectiveness
D. Sales History

Answer: C

Question: 40

You have lead that has an open phone call activity. You qualify the load.
You need to identify what occurs to the open phone call.
What should you identify?

A. The activity is canceled.

B. The Regarding field of the activity is changed to the opportunity.
C. The activity is completed
D. The activity is displayed on the opportunity record.

Answer: D

Question: 41

The Base currency for your Dynamics CRM organization is US dollars.
You have an order that has a transaction currency in euros.
You need to identify which events will cause the exchange rate for the order to be recalculated. Whit h two events should you identity? Each correct answer presents a complete solution.

A. The currency of the order record is updated.
B. The exchange rates are updated in CRM.
C. The order record is opened.
D. The record state of the order record changes.

Answer: CD

Question: 42

You Have a quote named Quote1 that is sent to a customer. The customer approves the quote. You generate an order from Quote 1 You need to identify the status of the order. What should you identify?

A. Invoiced
B. Ready
C. Draft
D. Canceled
E. Active

Answer: E

Question: 43

You have an opportunity record.
When you attempt to increase the Estimate Revenue field, you discover that the field is locked.
You need to identify a possible cause of the issue.
What should you identify?

A. The products in the opportunity are write-in products.
B. The estimated revenue exceeds the budget amount.
C. The opportunity contains conflicting currencies.
D. The method of revenue is system-generated.

Answer: D

Question: 44

You have an opportunity that has three open activities.
The opportunity record and the activity records are owned by a user named User1. User 1 assigns the opportunity to a user named
You need to identify what occurs to the ownership of the records.
What should you identify?

A. User1 remains the owner of the opportunity and the activities.
B. User1 remains the owner of the opportunity. Users2 becomes the owner of the activities
C. User2 becomes the owner of the opportunity and the activities.
D. User2 becomes the owner of the opportunity. User1 remains the owner of the activities

Answer: C

Question: 45

You quality a lead for a business account.
After several conversations with the business contact you discover that the business used a different vendor.
Which record should you deactivate?

A. opportunity
B. lead
C. contact
D. account

Answer: A

Question: 46

You have two opportunities named Opp1 and Opp2 that created to a customer. The customer request a single quote that contains the line items from both opportunities. From Opp1, you generate a new quote that contains all of the line items in Opp1. You need to add the line items in Opp2 to the quote.
What should you did?

A. From Opp2, Click Assign
B. From Opp2, Click New Quote
C. From the quote, Click Get Products
D. From the quote, associate the quote to Opp2

Answer: C

Question: 47

You have an opportunity in Dynamics CRM
A coworker requests some information regarding the progress or the opportunity. The coworker does not have access to CRM. You need to send spa iii< details aboui the opportunity to the coworker.
What should you do first?

A. Click Email a Link.
B. Apply a Microsoft Word template.

C. Add the coworker to the access team.
D. Apply a Microsoft Excel template

Answer: B

Question: 48

For a Customer an invoice named Inv1 is created automatically from an order named Ord1. The customer asks you to add a Hat delivery charge as a line item to the invoice. You do not have a delivery charge in the product catalog. You need to add the delivery charge as a line in the invoice. What should you click first?

A. Get Products
B. Write-in Product
C. Use Current Pricing
D. Recalculate

Answer: C

Question: 49

You need to convert a tweet into a lead.
Which button should you use?

A. Set Regarding
B. Link to CRM
C. Add Profile
D. Import Data

Answer: B

Question: 50

You have an order named Order1 that was created from a quote.
You create an invoice for a customer by clicking Create Invoice.
You need to identify what will occur to the order after the invoice is created
What should you identify?

A. The order will remain open.
B. The order will be closed and will have a Status of Partial.
C. The order will be closed and will have a status of Complete.
D. The order will be closed and will have a status of Canceled.

Answer: A

Question: 51

You have a quote named Quote1that is sent to a customer.
The customer approves the quote.
You generate an order from Quote1.

You need to identify the status of the order.
What should you identify?

A. Ready
B. Draft
C. Active
D. Canceled
E. Invoiced

Answer: A

Question: 52

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: 53

You submit a quote to a customer. The customer asks you to revise the quote. You need to identify what occurs when you revise the quote. What should you identify?

A. The original quote record is deleted and a new quote record is generated.
B. The original quote is modified and the quote status is set to Draft.
C. The original quote record is canceled and a new quote record is generated.
D. The original quote is modified and the quote status is set to Active.

Answer: B

Question: 54

You have a quote named Quote1that originates from an opportunity named Opp1. Quote1 is approved by a customer. You need to create an order record, close the quote, and close the opportunity records. What should you do?

A. From the quote, click Close Quote.
B. From the quote, click Create Order.
C. From the opportunity, change the status.
D. From the opportunity, click Close as Won.

Answer: B

Question: 55

You receive an email message from a trade show attendee who is interested in learning more about your products. You need to identify the next step in the sales process. What should you do next?

A. Convert the email message to a lead.
B. Share the message with the sales team.
C. Convert the message to a campaign response.
D. Forward the message to the inbound sales queue.

Answer: D

Question: 56

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: 57

You have two price lists described as shown in the following table.

Price list name	Product	Price
Pricelist1	Product1	$10
	Product3	$10
	Produc4	$10
Pricelist2	Product1	$15
	Product2	$20

You create an opportunity that uses Pricelist1.
The opportunity contains line items for Product1 and Product3. You add a write-in product named Product5 that has a price of $8.
You change the opportunity to use Pricelist2, and then you add Product2.
You need to identify which products are listed in the opportunity.
What should you identify?

A.
•Product1 with a price of $15
•Product2 with a price of $20
•Product 3 with a price of $10
•Product5 with a price of $8
B.
•Product1with a Price of $15

•Product2 with a price of $20
•Product5 with a price of $8
•Product3 removed
C.
•Product1 with a price of $10
•Product2 with a price of $20
•Product3 with a price of $10
•Product5 with a price of $8
D.
•Product2 with a price of $20
•Product5 with a price of $8
•Product1and Product3 removed

Answer: A

Question: 58

Recently, you lost several opportunities to the same competitor.
You want to start tracking lost opportunities.
You need to identify what information about the competitor can be retrieved from Dynamics CRM.
What two pieces of information should you identify? Each correct answer presents a complete solution.

A. the opportunities at risk to the competitor
B. the projected revenue of the competitor
C. the value of each opportunity lost to the competitor
D. the stakeholders of the competitor

Answer: AB

Question: 59

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: A

Question: 60

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: B

Question: 61

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: 62

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: B

Question: 63

You need to identify what occurs when you assign a goal. What should you identify?

A. The user responsible for meeting the goal changes.
B. The goal is added as a child to a parent goal.
C. The goal becomes the parent goal of another goal.
D. The user responsible for managing the goal changes.

Answer: D

Question: 64

Your sales team has a call center manager who is responsible for helping sales representatives convert leads into

opportunities.
You need to create a goal for the call center manager that has a total of all the opportunities created from the leads during a fiscal period.
What should you configure on the goal record?

A. the target field
B. the Roll Up Only from Child Goals option
C. the rollup query
D. the Record Set for Rollup option

Answer: D

Question: 65

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: 66

You run the built-in Sales History report and you discover that the report shows only data from the last 365 days. You need to ensure that the report shows only data from the last fiscal year. What should you do?

A. Edit the report definition.
B. Edit the filter.
C. Modify the Fiscal Year Settings.
D. Edit the time format from your personal options.

Answer: A

Question: 67

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: 68

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: 69

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: 70

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

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: 71

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: 72

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: 73

You plan to export sales data that will be used in the annual report of your company. You need to provide a copy of some of the sales data to the company stakeholders. Which format can you use to export the data?

A. Microsoft Word
B. Microsoft PowerPoint
C. Adobe PDF
D. Microsoft Visio

Answer: C

Question: 74

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: 75

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 en 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 from t

Answer: A

Question: 76

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.

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: 77

You need to ensure that a volume discount for a product named Product1 is applied automatically when a quote contains 10 or more units of Product1.
What should you use?

A. the product properties.
B. a discount list.
C. the percent of margin pricing method.
D. the percent of list pricing method.
E. price list items.

Answer: C

Question: 78

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.

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

Answer: ABC

Question: 79

You plan to use discount lists.
Which type of record can you associate to a discount list?

A. price list items
B. competitor
C. product bundle
D. product family
E. product

Answer: E

Question: 80

You have a custom currency that has a precision of 4.
You need to identify how the current.
What should you identify?

A. 3.333
B. 8.5648
C. 36.77
D. 9999

Answer: C

Question: 81

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: 82

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: 83

You have a Dynamics CRM organization.
You need to ensure that you can analyze sales trends by product category.
What should you add?

A. product families
B. unit groups
C. subjects
D. product properties
E. property option set items

Answer: E

Question: 84

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: 85

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: 86

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.

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: 87

You need to create an interactive map that will provide you with the ability to view open opportunities by region.
What are two Microsoft Power BI components that you can use to create the map? Each correct answer presents a complete solution.

A. Power View
B. Power BI Design Studio
C. PowerPivot
D. Power Query
E. www.powerbi.com

Answer: AC

Question: 88

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.

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: 89

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: 90

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: 91

You have a Dynamics CRM organization that uses server-side synchronization for email processing. You need to identify at which levels alerts can be generated when there are issues processing email. Which three levels should you identify? Each correct answer presents part of the solution.

A. organization
B. business unit
C. email
D. email server profile
E. mailbox

Answer: C

Question: 92

You have a Dynamics CRM organization that is configured to use Microsoft SharePoint server-based integration for document management.
You need to identify which two components that can be integrated with CRM require SharePoint server-based integration.
Which two components should you identify? Each correct answer presents a complete solution.

A. Microsoft Yammer

B . Microsoft OneDrive for Business
C. Microsoft Office Graph
D. Microsoft Social Engagement
E. Microsoft Dynamics Marketing

Answer: BD

Question: 93

You have a Dynamics CRM organization that uses server side synchronization to process email.
A manager requests that you create the mailbox records defined as shown in the following table.

Record name	Incoming Email	Outgoing Email	Appointments, Contacts, and Tasks	Is Forward Mailbox
User1	Microsoft Dynamics CRM for Outlook	Microsoft Dynamics CRM for Outlook	Microsoft Dynamics CRM for Outlook	No
User2	Server-Side Synchronization or Email Router	None	Server-Side Synchronization	Yes
User3	Forward Mailbox	Server-Side Synchronization or Email Router	Microsoft Dynamics CRM for Outlook	No
User4	Forward Mailbox	Server-Side Synchronization or Email Router	Server-Side Synchronization	Yes

You need to identify which record will fail to be created. Which record should you identify?

A. User1
B. User2
C. User3
D. User4

Answer: C