Microsoft

MB2-704 Exam

Microsoft Dynamics CRM Application

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

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