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MB2-632

Microsoft
Applications in Microsoft Dynamics CRM 4.0

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Question: 1
Your company has just started trading internationally, and the Head of Sales at your company
has asked you to produce a list of Opportunities, showing the estimated revenue in both the
transaction currency and the base currency, and also the exchange rate. None of the existing
Opportunities views include all the fields you need. How can you produce the data and make it
available to the Head of Sales as quickly as possible? Choose the 2 that apply.

A. Export to Excel and choose 'Static worksheet with records from this page'. Select the
   columns you need in the report.
B. Export to Excel and choose 'Dynamic worksheet'. Select the columns you need in the report.
C. Export to Excel and choose 'Dynamic PivotTable? Select the columns you need in the report.
D. Use advanced find to generate a view with the correct fields. Save the resulting view and
   share it.

Answer: B, D

Question: 2
You are a sales manager working for a large corporation that handles investments. Sales
personnel are limited to viewing only their own customer records because of the sensitive nature
of the business. One of your sales team, William, is taken seriously ill. You need to allocate
another salesperson, Patricia, to manage William's accounts and opportunities while he is unwell.
You will want William to manage his own accounts and opportunities when he returns to work.
What should you do?

A. Select all the accounts that William owns and assign them to Patricia.
B. Select all the accounts that William owns and share them with Patricia.
C. Select all the activities that William owns and assign them to Patricia.
D. Select all the opportunities that William owns and share them with Patricia.

Answer: B

Question: 3
You are a Sales Representative working in Microsoft Dynamics CRM Outlook with offline access.
You want to recording the details of an opportunity and have opened an account to view the
information and need to know if the account is active. What is the most efficient way to locate this
information?

A. Click on the Administration tab and check the status field.
B. Use the Status Bar at the bottom of the form to view the status of the record.
C. Use the Form Assistant at the right side of the entity to view the status.
D. Use the Inactive Accounts view to see if the account is present.

Answer: B

Question: 4
You are a marketing manager and discover that not all of your telemarketers call leads to verify
contact details such as the postal address. You want to remind your telemarketers do this before
the lead is included in any campaign activity. What is the most efficient way to do this?

A. Ask your administrator to only allow a small group of telemarketers who are trusted to
   generate follow up calls for all the leads they enter.
B. Set up an automated workflow that generates a follow up call for each new lead, and assign
   the call to a queue. Instruct the telemarketers to make the calls in the queue.
C. Set up an automated workflow to generate an email informing you when a new lead is
   created so you can generate a follow up activity.

D. Create a view using advanced find to identify any new leads generated which do not have any activities associated with them. Generate follow up calls for these leads.

Answer: B

Question: 5
You are a support engineer for an international manufacturing company. You receive an email from a client entitled alfunction with productID ABC123 but the body of the email does not provide any more information about the problem. You know the client exists in Microsoft Dynamics CRM. What is the most efficient way to record this as a case for this client?

A. Select the Email. Click Track in CRM and then click Set regarding. In the Look for drop-down select Case and then select New. Record the details of the case.
B. Open the Email. Click Track in CRM and then click View in CRM. In the CRM form for the e-mail, create a case from the actions menu.
C. Select the Email. Click Track in CRM and then click Set regarding. In the Look for records window, select New and record the details of the case.
D. Open the Email. Click Track in CRM and then click Regarding. In the Look for drop-down select Case and then select New. Record the details of the case.

Answer: B

Question: 6
Your company Microsoft Dynamics CRM installation uses British Pounds (GBP) as its default currency and you have set Euros (EUR) as your default currency. You enter an opportunity detail for a customer that transacts business in United States Dollars (USD). After you save the opportunity you notice that you forgot to change the currency to USD and it has recorded the revenue in EUR. What should you do in order to correct this error?

A. Edit the Opportunity and change the currency to USD.
B. Edit your Personal Options and under the General Tab set the default currency to USD. Re open the Opportunity to see the changed currency.
C. Re-create the Opportunity but this time select the currency as USD. Then delete the incorrect opportunity.
D. Ask your Systems Administrator to update the currency for this opportunity.

Answer: C

Question: 7
You have an opportunity with a customer to sell a range of products. The customer has an account record in the Microsoft Dynamics CRM database and has informed you they have hired a consultant to help them decide whether to buy the products from your company. You want to add this consultant to the Microsoft Dynamics CRM system, and record that he is advising your customer on this purchase. What should you do?

A. Create a new account for the consultant. Make the new account a sub-account of each customer account.
B. Add the consultant as a new contact under each customer account.
C. Create a new contact for the consultant. Create a relationship role called Consultant that enables a contact to be linked to an opportunity. In each opportunity, add a new relationship to the consultant contact using the Consultant relationship role.
D. Create a new contact for the Consultant. Create a relationship role called Consultant that enables a contact to be linked to an account. In the account record for each customer add a new relationship to the consultant contact using the Consultant relationship role.

Question: 8
One of your customers is a hospital recorded in Microsoft Dynamics CRM 4.0 as an account record, and you have a contact record for a doctor who works at this hospital. You discover that this doctor also works one day a week at another hospital which is also a customer. You want to record this information in Microsoft Dynamics CRM 4.0. What should you do?

A. Create a relationship role called part time employee between contact and account, and link the doctor contact record to the second hospital using the relationship role.
B. Open the second hospital record, navigate to contacts, and choose add existing contact Select the doctor contact record.
C. Make the second hospital a sub-account of the first hospital.
D. Make the first hospital a sub-account of the second hospital.

Question: 9
Which of the following records are synchronized between Microsoft Outlook and Microsoft Dynamics CRM? Choose the 2 that apply.

A. Contacts
B. Accounts
C. Notes
D. Tasks

Question: 10
You are the second sales person for your company to work in Japan. You need to ensure that the default currency for any account records you create is set to Japanese Yen. What should you do?

A. Navigate to Set Personal Options and select a default currency.
B. Navigate to Set Personal Options and select a current format.
C. Navigate to Business Management and create a new currency.
D. Navigate to your User record and select a default currency.

Question: 11
You are a Sales Representative working for a small software supplier. You are working with an existing Lead. The Lead has a company name of Contoso which already exists as an Account in Microsoft Dynamics CRM 4.0. The Contoso Account has open Opportunities, but these relate to the Head office in Manchester and your Lead is with a subsidiary company in Birmingham. The person in the Lead does not exist as a contact in Microsoft Dynamics CRM 4.0. You need to record an Opportunity based on the Lead. What should you do?

A. Convert the Lead to an Account, Contact and Opportunity in Microsoft Dynamics CRM 4.0. Merge the two Contoso Accounts.
B. Convert the Lead to an Opportunity and Contact and relate this Opportunity to the existing Contoso Account.
C. Deactivate the Lead. Navigate to the Account and enter a new address, enter a new Opportunity and a new Contact.

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and many others.. See complete list Here