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You need to add the line items in Opp2 to the quote.What should you did? A. From Opp2, Click AssignB. From Opp2, Click New QuoteC. From the quote, Click Get ProductsD. From the quote, associate the quote to Opp2Answer: CExplanation:See step 5 below.Typically, you convert a quote that you have won into an order. Start with an active quote. Note that once a quote is accepted, you won't be able to revise it.1. Go to Sales > Quotes.2. Select the quote you want to create an order from.3. Click Create Order at the top of the Quote screen.4. Add a description and indicate whether or not you want to close the opportunity in the Create Order window and click OK.5. To add products from your opportunity to your quote, click Get Products at the top of the screen, select your opportunity, and click OK.6. Click the Save button at the bottom right corner of the screen. https://www.microsoft.com/en-us/dynamics/crm-customer-center/create-or-edit-an-order.aspx QUESTION 2You have an opportunity in Dynamics CRM.A coworker requests some information regarding the progress of the opportunity. The coworker does not have access to CRM.You need to send specific details about 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: BExplanation:After you create and import Microsoft Office Word templates into Microsoft Dynamics CRM, with one click users can generate standardized documents automatically populated with CRM data.Incorrect Answers:C: The coworker just need specific information, which can be exported, not general access through an access team. https://www.microsoft.com/en-us/dynamics/crm-customer-center/using-word-templates-in-crm.aspx QUESTION 3Yon 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.000Subsidiary1: $0Subsidiary2: S50O.0OOB. Company1: $OSubsidiary1: SOSubsidiary2: $500,000C. Company1: $500,000Subsidiary1: $500.000Subsidiary2: $500,000D. Company1: $OSubsidiary1: $500.000Subsidiary1: $500.000 Answer: C QUESTION 4You 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 completedD. The activity is displayed on the opportunity record. Answer: DExplanation:Note: A lead entity represents an individual that is identified as someone who is interested in receiving specific information about the products or services offered by the company. The information is provided to a lead by a salesperson through email or other communication activities available in Microsoft Dynamics CRM. A lead is used to track contacts or accounts that are potential customers, but who have not yet been qualified.Lead management is largely the same as opportunity management. However, a lead is kept separate from customer and opportunity data until the lead is qualified. The possible states for a lead are Open, Qualified, and Disqualified. A qualified lead may be converted to an account, contact or opportunity. https://msdn.microsoft.com/en-us/library/gg328442.aspx QUESTION 5You 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. ActualB. targetC. Rollup Query - ActualD. In-ProgressE. Rollup Query - In Process Answer: BExplanation:In preparation for goal management, you should specify a metric for a goal (amount or count), create a goal hierarchy, and set the targets.A goal manager sets or modifies goal targets, adjusts the goal time period, and assigns a goal owner.https://msdn.microsoft.com/en-us/library/gg309258.aspx QUESTION 6You 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 chartB. Export the Fetch XML. and then import a chart.C. Run the Report Wizard.D. Create a personal report. Answer: CExplanation:When Select the basic format of the report.Table only. This provides a table grouped and sorted as you specified.Chart and table. Displays both a chart and table.Show table below the chart on same page. Selecting the chart does nothing.Show chart. To view data for a chart region, click the chart region. Selecting an area in the chart will display a table with details for that section of the chart. going through the Report Wizard you will give the following choice: https://www.microsoft.com/en-us/dynamics/crm-customer-center/create-edit-or-copy-a-report-using-the-report-wizard.aspx QUESTION 7Your company purchases a mailing list of purchasing managers at the companies in you area. 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: CExplanation:The business process bar in Microsoft Dynamics CRM Leads and Opportunities is a very useful tool for tracking where your sales revenue generating opportunities are in the sales cycle.If you are looking to modify the existing sales stages (Qualify, Develop, Propose and Close), that is simple enough. You just need to have a system administrator or system customizer role. Go into the Customizations area and click on the Option Sets. The Stage Category is the Option Set record we're looking to update. http://www.summitgroupsoftware.com/blog/changing-updating-and-adding-sales-stages-microsoft-dynamics-crm-2015 QUESTION 8Your 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 integrationB. server-based Microsoft SharePoint integrationC. Microsoft Social EngagementD. Microsoft Office 365 Groups Answer: BExplanation:Before you can enable OneNote integration, you need to turn on server-based SharePoint integration. https://www.microsoft.com/en-us/dynamics/crm-customer-center/set-up-and-use-onenote-in-crm.aspx QUESTION 9You 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 currencyD. The system default currency is the record default, unless a customer has a default currency Answer: DExplanation:Incorrect Answers:C: Multiple records in different transaction currencies can be aggregated, compared, or analyzed with regard to a single currency, by using an exchange rate. This is known as the base currency. You first define a base currency for the organization and then define exchange rates to associate the base currency with transaction currencies. The base currency is the currency in which other currencies are quoted. The exchange rate is the value of a transaction currency equal to one base currency.https://msdn.microsoft.com/en-us/library/gg328355.aspx https://debajmecrm.com/2014/07/15/understanding-currency-field-in-microsoft-dynamics-crm/ QUESTION 10You 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 worksheetB. Export the data to a Microsoft Excel static worksheetC. Open the view in Microsoft Excel Online.D. Select the records and click Edit. Answer: AD QUESTION 11You 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 Fetch xml file.B. Share the view.C. Email a link from the Advanced Find ribbon.D. Assign the view. Answer: BDExplanation:B: Personal views are owned by individuals and, because of their default User level access, they are visible only to that person or anyone else they choose to share their personal views with.D: When you have your view to share go ahead and click on the Assign Saved Views button and you will notice another popup appears. Choose the Assign to another user or team radio button and perform a look up for the user or team you are going to assign the view to.https://technet.microsoft.com/en-us/library/dn509578.aspx http://ledgeviewpartners.com/blog/sharing-personal-views-dynamics-crm/ QUESTION 12Your 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 familiesB. productC. price listsD. unit groups Answer: DExplanation:The product catalog is a collection of products and their pricing information. To set up pricing, you need to define the units in which your products are sold, the amount to charge for each unit, and the discounts you want to offer based on volume purchased. https://www.microsoft.com/en-us/dynamics/crm-customer-center/create-a-unit-group-and-add-units-to-that-group.aspx QUESTION 13Your 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: AEExplanation:A: Office 365 Groups are a shared workspace for email, conversations, files, and events where group members can collectively get stuff done.You can use groups to collaborate with people across your company, even if they don't have access to Microsoft Dynamics CRM Online.Before you can start using Office 365 Groups, the groups solution needs to be deployed and turned on for your CRM entities.Provision Office 365 Groups1. Browse to the Office 365 admin center and sign in using Office 365 Global administrator credentials.2. Click Admin > CRM.3. Click the Instances tab.4. Choose your instance, and then click Solutions.5. Select Office 365 Groups and then click Install.6. Review the terms of service and then click Install.You can configure OneNote in CRM Online when you're also using SharePoint Online. You must have a subscription to Office 365 to use OneNote in CRM Online.E: Configure Office 365 GroupsOnce you provision Office 365 Groups, you can enable them for any entity. Security group membership is associated with the entity. You configure Office 365 Groups in CRM Online.1. In CRM Online, click Settings > Office 365 Groups.2. On the Office 365 Groups Settings page, click Add properties button Add entity and choose an entity from the drop-down list. Repeat this step for each entity you want to enable, including custom entities.Etc.https://technet.microsoft.com/library/dn896591.aspx QUESTION 14Your 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: BDExplanation:Opportunities in Microsoft Dynamics CRM are the core record in the sales process. Used by the sales team, opportunities represent a potential sale for a specific customer. The creation of an opportunity adds this potential sale to the sales pipeline and therefore puts it on the radar of the sales manager who may be holding the team responsible for the progress of opportunities.Incorrect Answers:A, C: A lead represents any person or organization that a company might have the potential to do business with. http://crmbook.powerobjects.com/basics/microsoft-dynamics-crm-sales-process/opportunities/ QUESTION 15You 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 CRMB. only User1C. 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: C QUESTION 16You 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. opportunityB. leadC. contactD. account Answer: AExplanation:After you determine whether the prospective customer or an existing customer wants to purchase your product or service, you may close an opportunity. By closing an opportunity, you deactivate it, but you do not delete it. This gives you an option to reopen it later. When you close an opportunity, an opportunity close activity is created. It is represented by the opportunity close entity. You can use this entity to store information about the revenue, why you closed the opportunity, close date, and the competitor. It also contains the information about the user that created the opportunity. https://msdn.microsoft.com/en-us/library/gg334362.aspx QUESTION 17You need to identify which type of object can be associated to sales territories. Which type of object should you identify? A. OpportunitiesB. UsersC. LeadsD. FacilitiesE. Teams Answer: BExplanation:To assign members to a sales territory, open the territory, and then in the left pane, under Common, choose Members.On the Users tab, in the Records group, choose Add Members.In the Look Up Records dialog box, select a user, and then choose Add. https://www.microsoft.com/en-us/dynamics/crm-customer-center/set-up-sales-territories-to-organize-business-markets-by-geographical-area.aspx QUESTION 18You 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 ExcelB. Click Download Fetch XMLC. Save the Advanced Find as a view.D. Create a Microsoft Excel template. Answer: CExplanation:With immersive Excel you bring in Excel capabilities into CRM: Users can do all the major features expected on excel (e.g.: filters, pivot tables, charts, etc.), as they did before on real-time data, but now without leaving CRM web interface and having to export views as excel files.Always start Immersive Excel from a full CRM view: If Advanced Find is used to get the date to bulk update, save as a view first. https://community.dynamics.com/crm/b/mscrmdaily/archive/2015/04/18/2015-update-1-immersive-excel QUESTION 19Your 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 PipelineB. Neglected LeadsC. Lead Source EffectivenessD. Sales

History Answer: CExplanation:Lead Source Effectiveness reportFind out which type of lead is most beneficial in helping you grow your business. This report helps you compare how effective your lead sources are at generating quality opportunities.The report lists the percentage of qualified leads, and leads that generate revenue for each lead category.
https://www.microsoft.com/en-us/dynamics/crm-customer-center/lead-source-effectiveness-report.aspx QUESTION 20You 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: ACExplanation:C: You only need to test and enable a mailbox if you're using server-side synchronization as your synchronization method. You don't need to test and enable a mailbox if you're using CRM for Outlook or the Email Router for synchronization purposes.Every user in CRM gets a CRM mailbox by default. After your mailbox is set up, to synchronize it with an email server (Exchange or POP3) using server-side synchronization, you have to click the Test & Enable Mailbox button to make sure the mailbox is linked and configured correctly. A: You can use mailbox monitoring to poll one or more mailboxes for incoming email messages, and then determine what actions Microsoft Dynamics CRM will take based on the email message, such as create or update records in the system. You can configure server-side synchronization or the Email Router to monitor either of the following:A forward mailbox. This is a single, central mailbox.The mailbox for each user or queue. If you administer an organization that has to monitor a large number of mailboxes, you should consider using a forward mailbox to reduce the administrative effort. Monitoring many mailboxes can sometimes require maintaining access credentials in many incoming configuration profiles.
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