MB2-713 Dumps

Microsoft Dynamics CRM 2016 Sales

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NEW QUESTION 1
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

NEW QUESTION 2
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

NEW QUESTION 3
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

NEW 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

NEW QUESTION 5
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

NEW QUESTION 6
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

NEW QUESTION 7
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

NEW QUESTION 8
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

NEW QUESTION 9
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

NEW QUESTION 10
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

NEW QUESTION 10
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

NEW QUESTION 11
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

NEW QUESTION 14
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

NEW QUESTION 17
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

NEW QUESTION 20
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

NEW QUESTION 23
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

NEW QUESTION 26
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

NEW QUESTION 28
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

NEW QUESTION 31
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

NEW QUESTION 34
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 Fetch xml file.
B. Share the view.
C. Email a link from the Advanced Find ribbon.
D. Assign the view.

Answer: BD

NEW QUESTION 35
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

NEW QUESTION 40
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

NEW QUESTION 42
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

NEW QUESTION 43
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

NEW QUESTION 45
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 quarter
B. Create a report by using a system view.
C. Create the goals by using quarter
D. Create a personal view that uses a filter.
E. Change the System Settings for the goal.
F. Change the Fiscal Year Settings.

Answer: D

NEW QUESTION 47
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

NEW QUESTION 49
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

NEW 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

NEW QUESTION 59
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 qualifie
C. The associated email, task, and phone call activities will be deleted.
D. The lead will revert to being unqualifie
E. The associated email, task, and phone call activities will be deleted.
F. The lead will revert to being unqualifie
G. The associated email, task, and phone ca
H. activit.es will be associated to the lead

Answer: C

NEW QUESTION 62
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 for
B. Create a new contact, and then click Connect.
C. Close the opportunity for

D. Create a new contact, and then click Assign.
E. From the opportunity, click Quick Create from the navigation bar.
F. From the opportunity, click Contact, select New, and then use the Quick Create form.

Answer: C

NEW QUESTION 66
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

NEW QUESTION 67
You have a Dynamics CRM organization that uses server side synchronization to process email.
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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

NEW QUESTION 69
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

NEW QUESTION 73
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

NEW QUESTION 74
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

NEW QUESTION 75
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

NEW QUESTION 76
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

NEW QUESTION 79
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

NEW QUESTION 82
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

NEW QUESTION 87
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 O
B. 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 O
D. Locate the opportunity close activity, and then modify the activity.
E. From the opportunity, specify a competitor, click Close As Lost, and then click OK.

Answer: B

NEW QUESTION 90
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

NEW QUESTION 91
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

NEW QUESTION 96
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

NEW QUESTION 100
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