

## MB2-712 Dumps

# Microsoft Dynamics CRM 2016 Customization and Configuration

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**NEW QUESTION 1**

You have a Dynamics CRM organization. The organization does not use CRM for marketing.  
You need to prevent Marketing from displaying on the Account form navigation. What should you do?

- A. Delete all of the items in the Marketing group.
- B. Hide the Marketing group.
- C. Minimize the Marketing group.
- D. Delete the Marketing group.

**Answer: B**

**NEW QUESTION 2**

You have a Dynamics CRM organization that contains the business units configured as shown in the following table.

Business unit name	Parent
Default	<i>Not applicable</i>
Businessunit1	Default
Businessunit2	Businessunit1
Businessunit3	Businessunit2
Businessunit4	Businessunit3

You configure Businessunit2 to have the Default business unit as a parent, You need to identify which business unit is now the parent of Businessunit4. Which business unit should you identify?

- A. Default
- B. Businessunit2
- C. Businessunit3
- D. Businessunit1

**Answer: A**

**NEW QUESTION 3**

You receive leads that are generated from your company's website.  
Once the leads are in Dynamics CRM, they must be assigned to a specific CRM user based on the city from which the lead came, and then moved to the queue of the user.  
You plan to create a workflow to manage the process.  
You need to identify which event should be used to trigger the workflow.

- A. Record is assigned.
- B. Record status changes.
- C. Record is created.
- D. Record is deleted.

**Answer: C**

**NEW QUESTION 4**

You have a Dynamics CRM organization. Currently, users can view 50 records per page.  
You need to ensure that the users can view 250 records per page. What should you do?

- A. Instruct the users to configure their options.
- B. Instruct the users to create custom views.
- C. Instruct an administrator to configure the view settings, and then to share a view.
- D. Instruct the administrators to configure their options.

**Answer: A**

**NEW QUESTION 5**

You have a Dynamics CRM organization.  
Users access CRM from the web and from mobile apps. You plan to add a new entity to the organization.  
You need to ensure that the users can see the entity records from the web and from the mobile apps.  
What should you do?

- A. Activate the mobile express form.
- B. Configure the mobile express form.
- C. Modify the entity definition.
- D. Enable the users for offline access.

**Answer: C**

**NEW QUESTION 6**

A user named User1 is the owner of a background workflow that makes changes to an account after the Credit Limit field of the account is modified.  
A user named User2 adds a new account and saves the record.

A user named User3 edits the record and changes the street address of the account. A user named User4 edits the record and adds a parent account. User2 changes the value in the Credit Limit field and assigns the account to User4. You need to identify which name will be displayed in the Last Modified By Field on the account record. Which name should you identify?

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

**Answer: B**

#### NEW QUESTION 7

You are creating a business rule for the account records. The business rule will perform an action if the record has Country set to the United States and City set to either Redmond or San Francisco. You need to identify the minimum number of condition sets required to implement this logic. What should you identify?

- A. 1
- B. 2
- C. 3
- D. 4

**Answer: C**

#### NEW QUESTION 8

You have a Dynamics CRM organization. Currently, when you create entities and fields, they have a prefix of new\_. You need to ensure that when you create new entities and fields, they have a prefix of Contoso\_. Which two actions should you perform? Each correct answer presents part of the solution.

- A. Change the prefix in the System Settings to Contoso.
- B. Edit the customization prefix field and change the display name to Contoso.
- C. Change the prefix of the publisher associated to the solution to Contoso.
- D. Create a new publisher that has a prefix of Contos
- E. Associate the new publisher to the exiting solution.

**Answer: CD**

#### NEW QUESTION 9

You need to identify the maximum number of stages that a business process flow can contain. What should you identify?

- A. 5
- B. 10
- C. 30
- D. 100

**Answer: B**

#### NEW QUESTION 10

You modify the Account form to contain the contain the tabs configured and ordered as shown in the following table.

Tab name	Available on phone	Visible by default
General	Yes	Yes
Details	Yes	No
Address Info	Yes	Yes
Reseller Info	Yes	Yes
Vendor Info	No	No
Additional Info	Yes	Yes

You need to identify which tabs will be displayed by default on Dynamics CRM for tablets. Which tabs should you identify?

- A. only Genera
- B. Address Info, and Reseller Info
- C. only General, Address Info, Reseller Info, and Additional Info
- D. only General, Details, Address Info, Reseller Info, and Additional Info
- E. only General, Detail
- F. Address Info, and Reseller Info

**Answer: C**

#### NEW QUESTION 10

You have a custom entity named Entity1 that has three activated business process flows named BPF2. BPF2. and BPF3,

You need to ensure that BPF2 is visible only to customer service representatives from the web client. What should you do?  
What should you do?

- A. Branch the process flow.
- B. Configure security roles.
- C. Edit the process scope.
- D. Rename BPF2 to come before BPF1.
- E. Edit the definition of Entity1.

**Answer:** B

#### NEW QUESTION 11

Your Dynamics CRM organization uses Dynamics CRM Online.  
You need to assign a license for a new user. What should you use?

- A. the Microsoft Office 365 admin center
- B. the Microsoft Azure Service Bus settings
- C. the Dynamics CRM settings
- D. the Active Directory Users and Computers console

**Answer:** A

#### NEW QUESTION 15

You have a custom entity that has an active business process flow. You no longer need the business process flow.  
You need to ensure that you can delete the business process flow. What should you do?

- A. Modify the process options on the definition for the custom entity.
- B. Change the primary entity of the business process flow.
- C. Deactivate the business process flow.
- D. Delete all of the open records that use the business process flow.

**Answer:** C

#### NEW QUESTION 19

You have a Dynamics CRM organization.  
You have a list of 23 public views for accounts, most of which are custom. Many of the most frequently used views appear near the bottom of the list.  
Users report that the current list order is inconvenient and time consuming because they must scroll through many unused views.  
You need to recommend changes to resolve the issue reported by the users. What should you recommend doing first?

- A. Change the display order of the views.
- B. Deactivate the unused system views.
- C. Set customizable to True.
- D. Change the views to be private views.

**Answer:** A

#### NEW QUESTION 22

You have a Dynamics CRM organization.  
You need to tell a user which types of out-of-the box charts are available on a personal dashboard in CRM.  
Which two types of charts are available? Each correct answer presents a complete solution.

- A. tag
- B. Scatter
- C. pie
- D. funnel
- E. doughnut

**Answer:** CD

#### NEW QUESTION 25

You need to identify which types of data can be included in a business process flow.  
Which three types of data should you identify? Each correct answer presents a complete the solution.

- A. data from an attached Microsoft OneNote notebook
- B. data from the primary entity
- C. data from a related entity
- D. data from an unrelated entity
- E. data from a Microsoft Office group

**Answer:** ABC

#### NEW QUESTION 26

You plan to create a country entity that contains one record for each country in the world. You need to track which countries a contact visited. No additional data will be tracked. Which type of relationship should you create?

- A. a many-to-many (N:N) relationship from the contact to the country
- B. a one-to-many (1:N) relationship from the country to the contact



- C. a many-to-many (N:N) relationship from the contact to the country that has a relationship behavior type of Parental  
D. a one-to-many (1:N) relationship from the contact to the country

**Answer:** A

#### NEW QUESTION 31

You need to limit a user's ability to edit a specific field in a contact record. You enable field security on the field properties. What should you do next?

- A. Create an access team template.  
B. Enable hierarchical security.  
C. Create a new security role.  
D. Create a field security profile.

**Answer:** D

#### NEW QUESTION 32

You configure a new entity in a Dynamics CRM organization. You create fields, forms, and views for the new entity. You can view the new entity records as expected in the user interface. Users report that they fail to view the entity records. You need to ensure that the users can view the entity records. What should you do?

- A. Publish the changes.  
B. Add permissions to the security roles of the users.  
C. Add the entity to & custom solution.  
D. Configure the relationships.

**Answer:** B

#### NEW QUESTION 37

You have a Dynamics CRM organization.  
You add a new currency field named Revenue Potential to the account entity.  
On a record, you discover that the Revenue Potential field is displayed as 95.66. Other records also display the Revenue Potential field in this format. You need the Revenue Potential field to be displayed as nn.nnn. What should you configure?

- A. the display format in personal options  
B. the Formats tab in System Settings  
C. the default currency in personal options  
D. the Currencies settings in Business Management

**Answer:** D

#### NEW QUESTION 40

You have the business units in a Dynamics CRM organization as shown in the following table.

Business unit name	Parent business unit name
Root	None
Sales	Root
Enterprise Sales	Sales
Consumer Sales	Enterprise Sales
Service	Root

You create a new security role named New Employee that is being used by all of the business units. Users in the Consumer Sales business unit who are assigned the role report that they fail to update records that they should be able to update. You plan to update the security role so that the users can update the records. You need to identify in which business unit you must update the role. Which business unit should you identify?

- A. Sales  
B. Root  
C. Enterprise Sales  
D. Service  
E. Consumer Sales

**Answer:** C

#### NEW QUESTION 41

On the contact entity, you are creating a business rule that has the Set visibility action. You need to identify which form elements you can control by using the Set visibility action. What should you identify?

- A. the sub-grids and quick view forms only  
B. the form fields, form sections, and form tabs only  
C. the form fields only  
D. all of the form elements

**Answer:** C

**NEW QUESTION 44**

You need to model a relationship between the account entity and the contact entity to track the advisory board members of accounts. You need to use connections to model the relationship between the account and contact entities. What should you do?

- A. Create a one-to-many (1:N) relationship between the account and contact entities, and then use two connection roles to represent each side of the new 1:N relationship.
- B. Create a connection entity, and then use two connection roles to represent each entity in the relationship.
- C. Use two connection roles to represent each side of the relationship.
- D. Create a many-to many (N:N) relationship between the account and contact entities, and then use two connection roles to represent each side of the new N:N relationship.

**Answer: C**

**NEW QUESTION 49**

You create a business rule that has a Set business required action for a field. The action has a Status of Business Required when a condition is met. Users report that when they change the value so that the condition is false, the field is still required. You need to ensure that the field is required only if the condition is true. What should you do?

- A. Create an Else statement that has no conditions and a Set Default action to reset the field to Not Business Required.
- B. Use a business rule formula to set the required level of the field.
- C. Change the scope of the business rule to All Forms.
- D. Create an Else statement that has no conditions and a Set business required action.
- E. Configure the action to have a Status to Not Business Required.

**Answer: D**

**NEW QUESTION 53**

You import a managed solution that contains a custom entity named Loan. Loan is enabled for customization. You need to add a new field to the Loan entity. What are two possible ways to achieve the goal? Each correct answer presents a complete solution.

- A. Open the imported solution, locate the Loan entity, and then add the new field.
- B. Create a new solution, add the existing Loan entity, and then add the new field.
- C. Modify the Managed Properties of the Loan entity in the imported solution.
- D. Open the default solution, locate the Loan entity, and then add the new field.

**Answer: AB**

**NEW QUESTION 56**

You have a Dynamics CRM organization. You need to ensure that sales users can access the organization by using the Microsoft Dynamics CRM Windows Store app. What should you do?

- A. Modify the System Settings for the organization.
- B. Assign the Delegate user role to the users.
- C. Configure a server profile.
- D. Enable the CRM for mobile security privilege for a security role.

**Answer: D**

**NEW QUESTION 57**

You have a Dynamics CRM Online organization. You create an entity named Score to track a player's scores in a game. The ownership of the entity is set to Organization. You need to change the ownership to User or Team. The solution must minimize administrative effort. What should you do?

- A. Delete the entity and recreate it.
- B. Instruct the Microsoft Office 365 global administrator to use the web client to edit the entity properties.
- C. Use the web client to edit the entity properties.
- D. Use Microsoft SQL Server Management Studio to modify the entity properties.

**Answer: A**

**NEW QUESTION 59**

You have a business rule that has a scope of All Forms. You discover that the business rule does not execute on forms when users access the forms. You need to ensure that the business rule executes on the forms when accessed by the users. What should you do?

- A. Assign the users permission to read the business rule.
- B. Change the scope of the business rule from All Forms to Entity.
- C. Activate the business rule.
- D. Enable the execution of the business rule from the System Settings.

**Answer: A**

**NEW QUESTION 60**

You plan to create a field that will store email addresses.

You need to ensure that a user can send an email message by clicking the email address in the new field.

Which type of data should you use for the field?

- A. Lookup
- B. Two Options
- C. Single Line of Text
- D. Option Set

**Answer: C**

**NEW QUESTION 64**

You have a Dynamics CRM Online organization.

You need to identify the maximum number of rollup fields that you can define for an entity by default-

What should you identify?

- A. 5
- B. 10
- C. 30
- D. 100

**Answer: C**

**NEW QUESTION 68**

You have a Dynamics CRM organization.

You create a new entity named Question. You create a Quick Create form for the entity. You discover that when you create new records, the Quick Create form is not being used.

You need to ensure that the Quick Create form is used when you create new records. What should you do?

- A. Change the form order to list the Quick Create form first.
- B. Instruct users to access the form by using the CRM app for mobile devices.
- C. Enable Allow Quick Create for the entity properties.
- D. Change the security roles of the Quick Create form.

**Answer: D**

**NEW QUESTION 69**

You have a Dynamics CRM organization that has auditing enabled.

You need to provide a user with the ability to see changes made to specific records. To which entity should the user have the read privilege?

- A. Audit Partitions
- B. Audit Summary
- C. Audit History
- D. Plug-in Trace Log

**Answer: A**

**NEW QUESTION 71**

You have a Dynamics CRM organization.

You have a team named Team1 that has three members named User1, User2 and User3. Team1 currently owns 200 active contacts.

User1 fails to see the records assigned to Team1 from the default view. User1 sees only the records assigned to her.

You need to resolve the issue reported by User1.

What are two possible ways to achieve the goal? Each correct answer presents a complete solution.

- A. Configure a new default view for User1, User2, and User3.
- B. Configure the security role assigned to Team1.
- C. Configure the default view to include the records owned by Team1.
- D. Configure the security role assigned to User1.

**Answer: CD**

**NEW QUESTION 73**

You have a Dynamics CRM organization that has two business units named Sales and Marketing.

A user moves from the Sales business unit to the Marketing business unit As a result the user can no longer access CRM.

You need to ensure that the user can access CRM. What should you do?

- A. Rename the security roles for the Marketing business unit to match the security roles for the Sales business unit
- B. Restart the CRM server processes.
- C. Assign security roles to the user for the Marketing business unit
- D. Move the security roles for the Marketing business unit to a custom solution.

**Answer: A**

**NEW QUESTION 74**

You are creating a relationship between two entities.

You need to define a relationship type that will create a lookup field on one of the entities. Which type of relationship should you use?

- A. a one-to-one (1:1) relationship
- B. a relationship implemented by using connections
- C. a many-to-many (N:N) relationship
- D. a one-to-many (1:N) relationship

**Answer:** D

#### NEW QUESTION 77

You need to make a business process flow for a custom entity. What should you do first?

- A. Perform a Save As on an existing business process flow.
- B. Place the business process flow in the default solution.
- C. Add a process that has a reference to the custom entity.
- D. Enable the entity for business process flows.

**Answer:** B

#### NEW QUESTION 79

You enable access teams on the account entity and you create a new access team template named Collaborate Access. You need to ensure that users can share account records by using Access Teams. What should you do?

- A. Add a sub-grid of all the record types to the Account form that points to the accounts.
- B. Add a sub-grid of the related record types to the Account form that points to the accounts.
- C. Add a sub-grid of the related record types to the Account form that points to the users.
- D. Add a sub-and of all the record types to the Account form that points to the users.

**Answer:** B

#### NEW QUESTION 83

You plan to configure security for a Dynamics CRM organization. You enable field -level security on a field You establish a profile that can read and modify the field. You need to ensure that a user can read and modify the field.

What are two possible ways to achieve the goal? Each correct answer presents a complete solution.

- A. Assign the profile to the user.
- B. Configure the user as the owner of the profile.
- C. Assign the profile to a security role to which the user is assigned.
- D. Assign the profile to a team of which the user is a member.

**Answer:** AC

#### NEW QUESTION 88

You are creating a new entity.

You need to configure the parent-child access level on an entity privilege for security roles. Which type of entity ownership should you use?

- A. Organization
- B. SystemC User or Team
- C. Business Unit

**Answer:** B

#### NEW QUESTION 92

A user attempts to import data to Dynamics CRM, but all of the records fail to import because of a business rule that you created.

You need to ensure that the user can import the records successfully. What should the user do?

- A. Change the scope of the business rule to Entit
- B. Instruct the user to import the data again.
- C. Add an action to the business rule to hide the fiel
- D. Instruct the user to import the data again.
- E. Run the import by using the System Administrator account
- F. Change the scope of the business rule to All Form
- G. Instruct the user to import the data again.

**Answer:** B

#### NEW QUESTION 95

For the account entity, you need a form that can be opened by sales users only. You save a copy of the main contact form and you name the copy Sales form. What should you do next?

- A. Create a business rule.
- B. Add a web resource.
- C. Modify the Form Properties.
- D. Enable security roles.

**Answer:** C



**NEW QUESTION 96**

You have a Dynamics CRM organization.

The account entity must appear as Company to all users.

Which two fields should you change? Each correct answer presents

- A. Plural Name
- B. Display Name
- C. Name
- D. Description

**Answer: C**

**NEW QUESTION 100**

You have an entity that has two activated business process flows named BPF1 and BPF2. A user starts a process by using BPF1, but then discovers that BPF2 must be used. What should you tell the user?

- A. If you switch to BPF2, the stages from BPF1 will be retained.
- B. Ownership of the records created in BPF1 will be assigned to the system when you switch to BPF2.
- C. If you can access BPF1 and BPF2, you can switch between them at any time.
- D. The data entered while using BPF1 will be lost when you switch to BPF2.

**Answer: C**

**NEW QUESTION 101**

You create a vehicle entity to track the vehicles owned by a contact.

You create a one-to-many (1:N) relationship from the contact to the vehicle. You need to ensure that the vehicle records are deleted. What should you do?

- A. Set the relationship behavior for the delete action to deleted.
- B. Set the relationship behavior for the delete action to Remove Link.
- C. Set the relationship behavior for the delete action to Cascade All.
- D. Set the Type of Behavior for the relationship to Referential, Restrict Delete.
- E. Set the Type of Behavior for the relationship to Referential.

**Answer: C**

**NEW QUESTION 104**

You create a new solution in a Dynamics CRM organization.

You add a contact entity to the solution. You add a new rollup field to the contact entity. You need to identify what occurs to the rollup field when you attempt to delete the solution. What should you identify?

- A. The solution will be deleted and the rollup field will be deleted.
- B. The solution will be deleted.
- C. The rollup field will remain unchanged.
- D. A user will be prompted to delete the rollup field.
- E. You will be prevented from deleting the solution until the rollup field is deleted.

**Answer: A**

**NEW QUESTION 105**

You have a custom field.

You need to ensure that the field appears in Advanced Find results. What should you configure for the field?

- A. Field Security
- B. Searchable
- C. IMEMode
- D. Field Type

**Answer: B**

**NEW QUESTION 110**

You have a Dynamics CRM organization that contains one business unit.

You create a new background workflow in CRM and you enable the workflow to run OnCreate. You are the owner of the workflow.

After you activate the workflow, users report that the workflow fails to run after they create records.

You suspect that the workflow scope is configured incorrectly.

You need to identify which workflow scope prevents the workflow from running after the users create the records.

Which scope should you identify?

- A. Business Unit
- B. Organization
- C. User
- D. Parent: Child Business Units

**Answer: C**

**NEW QUESTION 113**

You are creating a business rule for the account entity. You are configuring a new condition for the rule to compare the Credit Limit field. The data type for the

Credit Limit field is Currency.

You need to identify to what you can compare the Credit Limit field. What should you identify?

- A. the entity field values or the static values only
- B. the entity field values, the static values, or the formulas
- C. the static values only
- D. the entity field values only

**Answer:** A

#### NEW QUESTION 116

You need to create a field on the account entity. The field must display the total value of all the open orders for an account. any sub-accounts of the account. Which two actions should you perform? Each correct answer presents part of the solution.

- A. Set Hierarchical to Yes.
- B. Set Hierarchical to No.
- C. Create a calculated field
- D. Create a simple field.
- E. Create a rollup field.

**Answer:** DE

#### NEW QUESTION 118

You are the new administrator for an existing Dynamics CRM organization.

The prior administrator made auditing available in CRM, and then turned off auditing for the account records. You need to implement auditing for the account records. What should you do?

- A. Assign the View Audit Summary privilege.
- B. Delete the previous audit log partitions.
- C. Modify the account entity definition.
- D. Assign the View Audit History privilege.

**Answer:** C

#### NEW QUESTION 119

You need to identify for which types of entities you can configure status reason transitions. Which two entity types should you identify? Each correct answer presents a complete solution.

- A. all system entities, except for activity entities
- B. the case entity
- C. all custom entities, except for custom activity entities
- D. the opportunity entity

**Answer:** AB

#### NEW QUESTION 122

You have a custom entity in Dynamics CRM.

You want users to be able to search and use knowledge base articles directly from the Main form of the custom entity.

You discover that you cannot add the knowledge base search control to the form.

You need to identify what prevents you from adding the control. What should you identify?

- A. Knowledge Management is disabled on the entity.
- B. Knowledge Management is disabled on the form.
- C. The notes control on the form is missing.
- D. A relationship to the knowledge base entity is missing.

**Answer:** C

#### NEW QUESTION 123

You have a Dynamics CRM organization.

A user named User1 creates a personal chart.

You need to make the personal chart into a system chart. What should you do?

- A. Instruct User1 to export the personal chart
- B. Import the chart as a system chart.
- C. Instruct User1 to share the chart with all users.
- D. Instruct User1 to share the chart with the system administrator.
- E. Instruct User1 to export the chart query
- F. Import the query as a system chart

**Answer:** A

#### NEW QUESTION 125

At your company, a user named User1 uses Dynamics CRM Online. User1 leaves the company.

You need to prevent User1 from accessing CRM Online.

What are two possible ways to achieve the goal? Each correct answer presents a complete solution.

- A. Reassign the records owned by User1.
- B. Disable User1 in CRM.
- C. Delete User1 from Microsoft Office 365.
- D. Revoke the Microsoft Office license.
- E. Revoke the CRM license.

**Answer:** AB

#### NEW QUESTION 130

You have four sales managers. Each sales manager is located in a different business unit and is assigned the Sales Manager security role. The sales managers have access to the records of every sales user in their respective business unit and the subordinate business units.

You need to recommend a solution to provide the sales managers with access to all of the records created by the sales users across all of the business units. The solution must prevent access to the case records.

What should you include in the recommendation?

- A. the Sales Managers security role privileges set to Parent: Child Business Units
- B. the Position hierarchy
- C. the Manager hierarchy
- D. the security roles assigned to the sales managers from the root business unit

**Answer:** C

#### NEW QUESTION 135

You have a Dynamics CRM organization.

You create an option set for a view. The option set contains the values configured as shown in the following table.

Label	Value	Date modified
One	2	1/6/2015
Two	1	1/5/2015
Three	3	1/8/2015
Four	4	1/7/2015

What is the default sort order of the labels?

- A. Two, One, Four, Three
- B. Four, One
- C. Three, Two
- D. One, Two, Three, Four
- E. Two, One, Three, Four

**Answer:** C

#### NEW QUESTION 138

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