Vendor: Microsoft

Exam Code: MB2-713

Exam Name: Microsoft Dynamics CRM 2016 Sales

Version: DEMO

QUESTION 1
You have two opportunities named Opp1 and Opp2 that created to a customer.
The customer request a single quote that contains the line items from both opportunities.
From Opp1, you generate a new quote that contains all of the line items in Opp1.
You need to add the line items in Opp2 to the quote.
What should you did?

A. From Opp2, Click Assign
B. From Opp2, Click New Quote
C. From the quote, Click Get Products
D. From the quote, associate the quote to Opp2

Answer: C
Explanation:
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 2
You 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: B
Explanation:
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 3
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
Explanation:
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 4
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
Explanation:
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 5
You 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 chart
B. Export the Fetch XML. and then import a chart.
C. Run the Report Wizard.
D. Create a personal report.

Answer: C
Explanation:

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 6
Your 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: C
Explanation:
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 7
Your 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 integration
B. server-based Microsoft SharePoint integration
C. Microsoft Social Engagement
D. Microsoft Office 365 Groups

Answer: B
Explanation:
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 8
You 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 currency
D. The system default currency is the record default, unless a customer has a default currency

Answer: D
Explanation:
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 9
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
Explanation:
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/

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