Exam Questions MB2-713
Microsoft Dynamics CRM 2016 Sales
NEW QUESTION 1
You need to create a quarterly goal to measure completed phone calls regarding open opportunities. Which three components should you use? Each correct answer presents part of the solution.

A. a calculated field
B. a goal metric that has the Amount metric type
C. a rollup field
D. a rollup query
E. a goal metric that has the Count metric type

Answer: CDE

NEW QUESTION 2
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 3
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 4
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

NEW QUESTION 5
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 6
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 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

NEW QUESTION 8
You qualify 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. opportunity
B. lead
C. contact
D. account

Answer: A

NEW QUESTION 9
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 10
You plan to export sales data that will be used in the annual report of your company. You need to provide a copy of some of the sales data to the company stakeholders. Which format can you use to export the data?

A. Microsoft Word
B. Microsoft PowerPoint
C. Adobe PDF
D. Microsoft Visio

Answer: C

NEW QUESTION 11
You need to identify the default sales business process flow. What should you identify?

A. develop, review, update, close
B. identify, research, close
C. qualify, develop, propose, close
D. qualify, research, review, close

Answer: B

NEW QUESTION 12
You have an order named Order1 that was created from a quote. You create an invoice for a customer by clicking Create Invoice.
You need to identify what will occur to the order after the invoice is created. What should you identify?

A. The order will remain open.
B. The order will be closed and will have a Status of Partial.
C. The order will be closed and will have a status of Complete.
D. The order will be closed and will have a status of Canceled.

Answer: A

NEW QUESTION 13
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 14
You have a Dynamics CRM organization.
A manager wants to share data with an external consultant by using a dynamic PivotTable. You need to tell the manager what to do before the external consultant...
can access the data
in the PivotTable. What should you instruct the manager to do first?

A. Add Share access to a security role.
B. Assign a license.
C. Add Append To access to a security role.
D. Assign a view.

Answer: A

NEW QUESTION 15
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 qualified.
C. The associated email, task, and phone call activities will be deleted.
D. The lead will revert to being unqualified.
E. The associated email, task, and phone call activities will be deleted.
F. The lead will revert to being unqualified.
G. The associated email, task, and phone call activities will be deleted.
H. The lead will revert to being unqualified.

Answer: C

NEW QUESTION 16
You have two price lists described as shown in the following table.

<table>
<thead>
<tr>
<th>Price list name</th>
<th>Product 1</th>
<th>Product 3</th>
<th>Product 4</th>
<th>Product 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pricelist 1</td>
<td>$10</td>
<td>$10</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pricelist 2</td>
<td></td>
<td>$15</td>
<td></td>
<td>$20</td>
</tr>
</tbody>
</table>

You create an opportunity that uses Pricelist 1. The opportunity contains line items for Product1 and Product3. You add a write-in product named Product5 that has a price of $8. You change the opportunity to use Pricelist 2, and then you add Product2. You need to identify which products are listed in the opportunity.

A. •Product1 with a price of $15•Product2 with a price of $20•Product 3 with a price of $10•Product5 with a price of $8
B. •Product1 with a price of $15•Product2 with a price of $20•Product5 with a price of $8•Product3 removed
C. •Product1 with a price of $10•Product2 with a price of $20•Product3 with a price of $10•Product5 with a price of $8
D. •Product2 with a price of $20•Product5 with a price of $8•Product1 and Product3 removed

Answer: A

NEW QUESTION 17
You have a Dynamics CRM organization. You need to ensure that you can analyze sales trends by product category. What should you add?

A. product families
B. unit groups
C. subjects
D. product properties
E. property option set items

Answer: E

NEW QUESTION 18
You have a quote named Quote1 that 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 19
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 20

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