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Microsoft MB2-632

Applications in Microsoft Dynamics CRM 4.0

Q&A DEMO

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1. You are a marketing manager and discover that not all of your telemarketers call leads to verify contact details such as the postal address. You want to remind your telemarketers do this before the lead is included in any campaign activity. What is the most efficient way to do this?

A. Ask your administrator to only allow a small group of telemarketers who are trusted to generate follow up calls for all the leads they enter.

B. Set up an automated workflow that generates a follow up call for each new lead, and assign the call to a queue. Instruct the telemarketers to make the calls in the queue.

C. Set up an automated workflow to generate an email informing you when a new lead is created so you can generate a follow up activity.

D. Create a view using advanced find to identify any new leads generated which do not have any activities associated with them. Generate follow up calls for these leads.

Answer: b

2. Which of the following are features of a quick campaign?

Choose the 2 that apply.

A. A particular quick campaign can target both accounts and contacts.

B. Campaign costs can be tracked.

C. Campaign responses can be tracked.

D. A quick campaign can have one campaign activity.

Answer: cd

3. You are a Sales Representative working in Microsoft Dynamics CRM Outlook with offline access. You want to recording the details of an opportunity and have opened an account to view the information and need to know if the account is active. What is the most efficient way to locate this information?

A. Click on the Administration tab and check the status field.

B. Use the Status Bar at the bottom of the form to view the status of the record.

C. Use the Form Assistant at the right side of the entity to view the status.

D. Use the Inactive Accounts view to see if the account is present.

Answer: b

4. You are a sales manager and use mail merge to send letters to contacts. You have created a personal email

template for these contacts. The marketing manager sees your email template and would like to use it for sending letters to accounts. What is the best way to achieve this?

- A. Share the template with the marketing manager.
- B. Edit the template and select Make available to organization.
- C. Change the template type from Contact to Global.
- D. Show the marketing manager how to create an email template.

Answer: d

5. You are using the Microsoft Dynamics CRM Client for Office Outlook which has just been installed by your administrator. You want to record the details of a new business contact in Outlook and also in CRM. How can you achieve this?

Choose the 2 that apply.

- A. Select New Contact from the Microsoft Dynamics CRM toolbar and enter the details of the new Contact.
- B. Select New Contact from the Microsoft Dynamics CRM toolbar and enter the details of the new Contact and click Track in CRM.
- C. Select File, New, Contact from the Outlook Menu and enter the details of the new Contact, and click Track in CRM.
- D. Select File, New, Contact from the Outlook Menu and enter the details of the new Contact.

Answer: ac

6. You use the Microsoft Dynamics CRM Client for Office Outlook. In the CRM Workplace, your activity list shows five phone calls and six appointments. You go to Outlook to view these activities. How do these appear in Outlook?

- A. In your calendar you see the appointments and phone calls synchronized from CRM.
- B. In your calendar you see the appointments synchronized from CRM. Your phone calls do not appear in Outlook.
- C. In your calendar you see none of these items but the phone calls and appointments appear as tasks in Outlook.
- D. In your calendar you see the appointments from CRM and in your task list you see the phone calls listed as tasks from CRM.

Answer: d

7. You are a support engineer for an international manufacturing company. You receive an email from a client

entitled Malfunction with productID ABC123, but the body of the email does not provide any more information about the problem. You know the client exists in Microsoft Dynamics CRM. What is the most efficient way to record this as a case for this client?

- A. Select the Email. Click Track in CRM and then click Set regarding. In the Look for drop-down select Case and then select New. Record the details of the case.
- B. Open the Email. Click Track in CRM and then click View in CRM. In the CRM form for the e-mail, create a case from the actions menu.
- C. Select the Email. Click Track in CRM and then click Set regarding. In the Look for records window, select New and record the details of the case.
- D. Open the Email. Click Track in CRM and then click Regarding. In the Look for drop-down select Case and then select New. Record the details of the case.

Answer: b

8. Your company has just started trading internationally, and the Head of Sales at your company has asked you to produce a list of Opportunities, showing the estimated revenue in both the transaction currency and the base currency, and also the exchange rate. None of the existing Opportunities views include all the fields you need. How can you produce the data and make it available to the Head of Sales as quickly as possible?

Choose the 2 that apply.

- A. Export to Excel and choose 'Static worksheet with records from this page'. Select the columns you need in the report.
- B. Export to Excel and choose 'Dynamic worksheet'. Select the columns you need in the report.
- C. Export to Excel and choose 'Dynamic PivotTable'. Select the columns you need in the report.
- D. Use advanced find to generate a view with the correct fields. Save the resulting view and share it.

Answer: bd

9. The Sales Director has asked you to use Microsoft Dynamics CRM to produce a list of accounts with outstanding opportunities. He would like to see the Account name, Account Sales territory, Opportunity topic and Opportunity estimated revenue. How can you achieve this?

Choose the 2 that apply.

- A. Create an Advanced Find on Accounts. Select the columns you need. Save the Advanced Find.
- B. Create an Advanced Find on Opportunities. Select the columns you need. Save the Advanced Find.

C.Create a report. Use Account as the primary entity.

D.Create a report. Use Opportunity as the primary entity.

Answer: bc

10. You have an opportunity with a customer to sell a range of products. The customer has an account record in the Microsoft Dynamics CRM database and has informed you they have hired a consultant to help them decide whether to buy the products from your company. You want to add this consultant to the Microsoft Dynamics CRM system, and record that he is advising your customer on this purchase. What should you do?

A.Create a new account for the consultant. Make the new account a sub-account of each customers account.

B.Add the consultant as a new contact under each customers account.

C.Create a new contact for the consultant. Create a relationship role called Consultant that enables a contact to be linked to an opportunity. In each opportunity, add a new relationship to the consultant contact using the Consultant relationship role.

D.Create a new contact for the Consultant. Create a relationship role called Consultant that enables a contact to be linked to an account. In the account record for each customer add a new relationship to the consultant contact using the Consultant relationship role.

Answer: c