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Question: 1

Company.com has a service that requires users and equipment. Which of the following have an effect on when the service can be scheduled? Choose the three that apply.

- A. Users' business units
- B. Organization-wide business closures
- C. Users' time zones
- D. Work schedule for the equipment

Answer: B, C, D

Question: 2

You are the schedule manager for your company. Company.com calls requesting a service. The service has already been defined and you decide to use the Service Calendar to automatically schedule the service. Which of the following can you do when scheduling the service appointment? Choose the two that apply.

- A. Specify additional equipment that is not part of the service definition.
- B. Schedule users outside their regular working hours.
- C. Choose specific users to perform the service.
- D. Set the length of time the service should take.

Answer: C, D

Question: 3

Which of the following records are synchronized between Microsoft Outlook and Microsoft CRM? Choose the two that apply.

- A. Contacts
- B. Accounts
- C. Notes
- D. Tasks

Answer: A, D

Question: 4

Which of the following are features of Marketing Automation in Microsoft CRM? Choose the three that apply.

- A. Creating and managing marketing lists
- B. Planning campaigns
- C. E-commerce Web sites
- D. Tracking estimated and actual cost and revenue information

Answer: A, B, D

Question: 5

As a Sales Manager using Microsoft CRM you want to see what types of Leads result in the most opportunities.

What is the most efficient way to obtain this information from Microsoft CRM?

- A. Create a new marketing campaign.
- B. Create a new View for Lead Types.
- C. Create a Microsoft CRM Advanced Find search.

D. Run the Microsoft CRM Lead Source Effectiveness Report.

Answer: D

Question: 6

Company.com offers volume discounts to customers based on the number of products that they buy; 10% is offered for purchases between 10 and 99 and 15% is offered for 100 and over. You want Microsoft CRM to automatically calculate the correct price when orders are entered. How should you implement this?

- A. Create two price lists, one for each of the two ranges.
- B. Create two additional price lists with the discounted prices for the two ranges.
- C. Create additional unit groups for each product with the discounted prices.
- D. Create one discount list that uses the two discount ranges.

Answer: D

Question: 7

In speaking with potential customers, the Sales Manager notices that several key opportunities have been lost and discovers that the customers purchased products from a rival company. The Sales Manager asks you, the Sales Representative, to add information about the rival company and why each opportunity was lost to the CRM database. The Sales Manager wants the information to be available to other sales representatives when they deal with these customers. How should you do this?

- A. Add the rival company as a new account, link this account to each customer's account using a relationship role and add a note against each customer's account together with a description of why the opportunity was lost.
- B. Add the rival company as a new competitor, reopen the lost opportunities, add the new competitor record to each one of the lost opportunities and close each opportunity with a description of why it was lost.
- C. Add the rival company as a new competitor and add a note against this record with a description of why each opportunity was lost.
- D. Add a note against each customer detailing the rival company and why the opportunity was lost.

Answer: B

Question: 8

The Vice President of Marketing wants to know how effective a campaign has been in generating interest in the company products and the forecast opportunity revenue. Which action should be taken?

- A. Run a Campaign Performance Report.
- B. Open the campaign and review the financials tab.
- C. Use Advanced Find to search for and examine campaign responses.
- D. Review the list of open opportunities.

Answer: A

Question: 9

A user complains that the Marketing group does not appear in the Workplace. You discover that the user is using the Microsoft CRM laptop client for Outlook when offline. You need to make sure that the user can see the Marketing group in their Workplace. What should you do?

- A. Make sure that the user has selected Marketing in Personal Options.

- B. Give the user access to the Marketing module using System Settings.
- C. Advise the user that the Marketing module is unavailable in the Microsoft CRM laptop client for Outlook.
- D. Instruct the user to go online.

Answer: A

Question: 10

In speaking with potential customers, the Sales Manager notices that several key opportunities have been lost and discovers that the customers purchased products from a rival company. The Sales Manager asks you, the Sales Representative, to add information about the rival company and why each opportunity was lost to the CRM database. The Sales Manager wants the information to be available to other sales representatives when they deal with these customers. How should you do this?

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- C. Add the rival company as a new competitor and add a note against this record with a description of why each opportunity was lost.
- D. Add a note against each customer detailing the rival company and why the opportunity was lost.

Answer: B

Question: 11

Which of the following is true regarding sites in Microsoft CRM Service Scheduling?

- A. A resource can belong to more than one site.
- B. Resource groups can be associated with sites.
- C. A site can be specified when booking a service activity.
- D. Sites represent customer locations.

Answer: C

Question: 12

You are a Sales Representative making telephone calls to potential customers from a list of Leads that have showed interest in products your organization sells. When talking to one Lead in particular you determine that they are no longer interested in your company products. What is the next step to follow so that any notes or activities remain with the Lead record?

- A. Convert the Lead record to a Contact record.
- B. Reactivate the Lead record so that no information is lost.
- C. Delete the Lead record.
- D. Deactivate the Lead record.

Answer: D

Question: 13

Which of the following steps should you perform when you implement service scheduling in Microsoft CRM?

Choose the two that apply.

- A. Define the facilities and equipment necessary to perform services.
- B. Define facilities and equipment costs.
- C. Define service offerings.
- D. Setup service contracts.

Answer: A, C

Question: 14

Company.com recently ran a marketing campaign using a list of imported leads. One of the targeted leads responds and asks to buy a support contract from you. You need to set up a contract for the new customer and make sure that service representatives can associate cases against the contract. Which of the following steps are required to do this? Choose the three that apply.

- A. Choose a contract template.
- B. Mark the contract as 'On Hold'.
- C. Add a contract line.
- D. Add the customer as an account or contact.

Answer: A, C, D

Question: 15

Which file types are valid for importing using the Microsoft CRM Import Wizard? Choose the two that apply.

- A. TXT
- B. XLS
- C. CSV
- D. XML

Answer: A, C

Question: 16

Which of the following is required to create a service so that it can be scheduled? Choose the two that apply.

- A. Equipment
- B. Duration
- C. A selection rule
- D. Customer name

Answer: B, C

Question: 17

You have been allocated a budget for a campaign. You need to track the actual cost of the campaign versus its budgeted cost. To which of the following should you assign a budget?

- A. Each planning task
- B. The campaign
- C. Each campaign activity
- D. Targeted marketing lists

Answer: B

Question: 18

Company.com has decided to invest in a new marketing initiative and wants to send brochures to existing accounts in various industries. The industry information is specified for each customer. Three e-mail messages have been created, each customized to a specific industry segment. What is the best way to implement the marketing campaign to make sure that each customer receives the correct e-mail?

- A. Create one campaign, one marketing list, and associate the three e-mail activities with the list.
- B. Create one campaign, three marketing lists, and associate the appropriate list with each email activity.
- C. Create three campaigns, one marketing list, and associate the list and e-mail messages with each campaign.
- D. Create three campaigns, three marketing lists, and associate the lists and e-mail messages with each campaign.

Answer: B

Question: 19

You just created a contract for a customer. The contract status is On Hold. The customer calls back to inform you of an additional product that they need to add to the contract. Which actions should you take to add this additional product to the contract? Choose the two that apply.

- A. Copy the contract.
- B. Release the contract from Hold.
- C. Add a new contract line for the new product.
- D. Delete the contract.

Answer: B, C

Question: 20

You are a Sales Representative and receive information from an account that they are no longer interested in a product but they want to be contacted in one year. How should the Sales Representative capture this information in Microsoft CRM?

- A. Close the opportunity as "Lost" and create a follow up activity in the Account record to contact the customer in one year.
- B. Create an order on the opportunity and create a follow up activity in the Account record to contact the customer in one year.
- C. Delete the opportunity and create a follow up activity in the Account record to contact the customer in one year.
- D. Close the opportunity as "Won" and create a follow up activity in the Contact record to contact the customer in one year.

Answer: A

Question: 21

You are a Sales Representative using Microsoft CRM Sales Management. You recently gave an existing customer a quote for a product which you have a record of in Microsoft CRM. The customer accepted the quote. What should be the next step that you would take to continue through a consistent Microsoft CRM sales process?

- A. Click the Close button to close out the Quote record.
- B. Click the Convert to Order button on the toolbar in the Quote record.
- C. Choose Activate Quote from the Actions menu for the Quote record.

D. Set a Follow Up activity on the existing Quote record.

Answer: B

Question: 22

You are a Sales Representative and receive an e-mail from an existing account that wants more information about a new product line. You want to enter the information in Microsoft CRM. Which Microsoft CRM record should you create to capture this information?

- A. Lead
- B. Opportunity
- C. Quote
- D. Order

Answer: B

Question: 23

Which of the following applies to knowledge base articles?

- A. Articles can be viewed by users as soon as they are submitted.
- B. Articles can be shared.
- C. Articles can be assigned.
- D. Only users who have permission can view articles.

Answer: D

Question: 24

You are responsible for scheduling the staff in your company. Some of your service technicians have been granted study leave and will be off work for a period of time each day. You want to make sure that these service technicians are not scheduled for service activities during these times. What is the most efficient method to accomplish this?

- A. Add a business closure that applies only to the relevant service technicians.
- B. Create a new resource group, add the relevant service technicians to the resource group and schedule time off for the resource group.
- C. Change the work schedule for each affected service technician individually.
- D. Add time off for each affected service.

Answer: C

Question: 25

Which of the following are features of planning tasks? Choose the two that apply.

- A. Can track actual and budgeted costs
- B. Can be assigned to a user
- C. Can be associated with a marketing list
- D. Can have a duration set

Answer: B, D

Question: 26

You are the system administrator and a service representative informs you that a knowledge base article contains errors. You search for the article in the knowledge base and confirm that it does contain incorrect information. You must stop the article from being accessed by other users. What action should you take?

- A. Delete the article
- B. Unpublish the article
- C. Revise the article
- D. Reject the article

Answer: B

Question: 27

A Sales Representative received an e-mail from a client accepting a recent quote they received for a product.

This action should be tracked in Microsoft CRM. What is the next action that should be taken to move to the next stage of the sales process?

- A. Add an activity to the quote and convert it to an order.
- B. Create a new Microsoft CRM invoice for the new product.
- C. Revise the quote and add an activity.
- D. Convert the quote to an Order and enter the won details in the dialog box.

Answer: D

Question: 28

Which of the following are features of a quick campaign? Choose the two 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: C, D

Question: 29

A Sales Representative receives information from a customer who is interested in purchasing a new bike and a set of new tires. The Sales Representative finds there is a special on new tires with the purchase of a new bike.

The client expresses interest in the special. What is the best way for the sales representative to capture this information into Microsoft CRM for the customer record?

- A. Add the information for the bike and the tires as products for a new Campaign Response.
- B. Add the information for the bike and the tires as products for a new opportunity.
- C. Add the information for the bike and the tires as products for a new Account.
- D. Add the information for the bike and the tires as products for a new Lead.

Answer: B

Question: 30

A case has been assigned to you. You reviewed the case and decide that it is best dealt with by another service representative therefore, you assign the case to a public queue. Who becomes the owner of the case?

- A. The user who created the queue.
- B. The owner does not change, you remain the owner.
- C. The queue.
- D. The owner of the customer record to which the case is attached.

Answer: B

Question: 31

Which of the following form part of the service scheduling process in Microsoft CRM? Choose the two that apply.

- A. Monitoring faulty products
- B. Creating services
- C. Managing a knowledgebase
- D. Planning service offerings

Answer: B, D

Question: 32

Which of the following tasks can be completed using features of Microsoft CRM? Choose the three that apply.

- A. Preparing profit and loss forecasts
- B. Sending e-mail messages to lists of accounts or contacts
- C. Setting up and scheduling services offered by a company
- D. Running marketing campaigns

Answer: B, C, D

Question: 33

Company.com is running a marketing campaign to promote a new product. A new customer calls you in response to the campaign and says that they are very interested in buying the new product from your company but wants to have more information. What is the best way to record the response?

- A. Create a campaign activity in the campaign, close and convert the activity into an opportunity.
- B. Create a campaign response in the campaign, close and convert the response into an opportunity.
- C. Create a new lead, add a link to the campaign in the lead record and convert the lead into a new customer record and an opportunity.
- D. Create a campaign response in the campaign, close and convert the response into a lead and convert the lead into a new customer record and an opportunity.

Answer: D

Question: 34

The Marketing Manager has to track responses from customers. Which of the following features should be used?

- A. Campaign Code
- B. Promotion Code
- C. Response Code
- D. Expected Response

Answer: B

Question: 35

Which record types can be created when a lead is converted? Choose the two that apply.

- A. Account
- B. Order
- C. Opportunity
- D. Quote

Answer: A, C

Question: 36

Which of the following apply to resolved cases? Choose the two that apply.

- A. The case can be shared.
- B. The case can be assigned.
- C. The case can be reactivated.
- D. The subject can be changed.

Answer: A, C

Question: 37

You recently implemented a marketing campaign that sent direct e-mails to a marketing list. Senior management decides that the same direct e-mail messages should be sent to a new list of customers. What is the best way to accomplish this?

- A. Create a new campaign, add the original list, add the new list, and create a new campaign activity.
- B. Copy the existing campaign, delete the existing lists, add the new list and create a new campaign activity.
- C. Add another marketing list to the campaign and create a new campaign activity.
- D. Add a new list to the existing campaign activity and rerun the original campaign activity.

Answer: C

Question: 38

You are a sales representative for your company. The Marketing Department is running a campaign and you want to know what tasks have been created for you to do. Where should you look?

- A. In the marketing lists that were used in the campaign.
- B. In the campaign activities created for the campaign.
- C. In the Activities in each of your customer records.
- D. My work in the Workplace.

Answer: D

Question: 39

You recently ran a campaign which has been marked as completed. Company.com contacts you on the telephone in response to the campaign expressing interest in the campaign product. What is the best way to record the telephone call from the customer?

- A. Add a new campaign response to the completed campaign.
- B. Create a new campaign with the same marketing lists and add a campaign response.
- C. Add a new opportunity against the customer record.
- D. Add a phone call activity against the customer's record.

Answer: A

Question: 40

Which of the following steps must be completed in order to create a marketing campaign that will create e-mail messages for customers? Choose the three that apply.

- A. Create planning tasks
- B. Add target lists
- C. Distribute campaign activities

D. Create campaign activities

Answer: B, C, D

Question: 41

Company.com has decided to designate certain customers as preferred customers. You have been asked to configure the Microsoft CRM system so that preferred customers are always quoted at 90% of the list price for all products. What steps must you take in order to accomplish this? Choose the two that apply.

A. Create a new price list called Preferred, set this list as the default price list for all preferred customers and add all products to the price list.

B. Create a discount list called Preferred, associate this list with each of the preferred customers.

C. Configure the pricing method as percentage of list set to 90%.

D. Configure the pricing method as currency amount calculated at 90% of the list price.

Answer: A, C

Question: 42

Which of the following record types cannot be used with a contact record to create a relationship role?

A. Account

B. Opportunity

C. Contact

D. Lead

Answer: D

Question: 43

You have an opportunity with a customer to sell a range of products. The customer has an account record in the Microsoft 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 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 customer's account.

B. Add the consultant as a new contact under each customer's 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

Question: 44

Which of the following are characteristics of campaign templates? Choose the two that apply.

A. Campaign templates must contain planning tasks.

B. Campaigns can be created from campaign templates.

C. Campaign templates can be created from campaigns.

D. Campaign templates must contain target marketing lists.

Answer: B, C

Question: 45

The Vice President of Sales wants to organize his sales force on a geographical basis for reporting purposes.

Which of the following features of Microsoft CRM should be used?

- A. Quotas
- B. Sites
- C. Teams
- D. Territories

Answer: D

Question: 46

You are a service representative for your company. A colleague in another division of your company tells you that he has a case that is best dealt with by you, but he would still like to see the activity on the case. Which actions should your colleague take? Choose the two that apply.

- A. Share the case with you
- B. Close the case
- C. Assign the case to you
- D. Resolve the case

Answer: A, C

Question: 47

You want to send e-mail to all customers in a particular city informing them about a new promotion. What is the fastest way to do this?

- A. Run the Sales History report to create a list of customers and for each account in the results list, open the account and add an e-mail activity.
- B. Add each customer to a new Marketing List and then use the new list to create a Quick Campaign to generate e-mail activities.
- C. Use Advanced Find to create a list of customers and then create a Quick Campaign for all records on all pages to generate e-mail activities.
- D. Use Advanced Find to create a list of customers and for each account in the results list open the account and add an e-mail activity.

Answer: C

Question: 48

A Sales Manager is given a list of Leads that the organizations wants to keep a record of in Microsoft CRM and designate to a Sales Representative according to the region they are located. What is the best process to automate the assigning of Leads to the appropriate sales representatives?

- A. Sales process
- B. Workflow Process
- C. Lead Process
- D. Reporting Process

Answer: B

Question: 49

A user has several contacts for a customer in the Microsoft Outlook contacts list. The user wants to add these contacts to Microsoft CRM without creating duplicate contacts. What is the most efficient way for the user to do this?

- A. Use the Bulk Import Wizard to import the contacts into Microsoft CRM.
- B. Create each contact manually in the Microsoft CRM database.
- C. Open each contact in the Microsoft Outlook contact list and click Track in Microsoft CRM.
- D. Copy and Paste each contact from the Microsoft Outlook contact list to the Microsoft CRM contact list.

Answer: C

Question: 50

A Sales Representative has just received a request for more information about a new product from an existing Microsoft CRM Lead. The Sales Representative must convert the Lead record. Which records can the Sales Representative select when converting a Lead record? Choose the three that apply.

- A. Opportunity
- B. Quote
- C. Contact
- D. Account

Answer: A, C, D

Question: 51

With which of the following records can sales literature be associated? Choose the two that apply.

- A. Products
- B. Quotes
- C. Accounts
- D. Competitors

Answer: A, D

Question: 52

As part of a marketing campaign your company outsourced the telemarketing. The telemarketing company has provided you with the results in a text file. What is the best way to add the results to the Microsoft CRM system?

- A. Import the text file as campaign responses.
- B. Import the text file as leads.
- C. Enter the results manually as campaign responses.
- D. Enter the results manually as leads.

Answer: A

Question: 53

Which of the following apply to canceled cases? Choose the three that apply.

- A. The case can be assigned.
- B. The case can be reactivated.
- C. The case is marked as read-only.
- D. The case can be shared.

Answer: B, C, D

Question: 54

Which of the following can be related to cases? Choose the two that apply.

- A. Knowledge base articles
- B. Leads
- C. Contract lines
- D. Service Activity

Answer: A, C

Question: 55

You are reporting on the success of marketing campaigns. Which of the following can be measured using Microsoft CRM reporting and analysis tools? Choose the three that apply.

- A. The overall marketing cost per response.
- B. The capacity to fulfill new orders.
- C. The number of opportunities created.
- D. The effectiveness of a particular marketing channel.

Answer: A, C, D

Question: 56

Which of the following are characteristics of contacts in Microsoft CRM? Choose the three that apply.

- A. A contact must have a parent account.
- B. A contact can have sub-contacts.
- C. An account does not have to have a contact.
- D. A contact can only have one parent account.

Answer: B, C, D

Question: 57

You are a Sales Manager using Microsoft CRM Sales Management. You want to obtain a report of all forecasted business closing in July. What is the best way to pull this information quickly from Microsoft CRM?

- A. Navigate to CRM Reports and pull an Account Summary report.
- B. Create a customized report using SQL Reporting Services.
- C. Create an Advanced Find search for all opportunities where the estimated close date is in the month of July.
- D. Export a list of Opportunities to an Excel spreadsheet and sort the Estimated Revenue column to put the dates in ascending order.

Answer: C

Question: 58

You are the system administrator. A user informs you that Microsoft CRM contacts are being synchronized with Microsoft Outlook but Microsoft CRM appointments are not being synchronized. What should you do?

- A. Instruct the user to go offline to initiate the synchronization process.
- B. Instruct the user to configure the automatic synchronization.
- C. Instruct the user to configure the synchronization process to include appointments.
- D. Advise the user that Microsoft CRM appointments cannot be synchronized with Outlook.

Answer: C

Question: 59

You created a campaign, added target marketing lists, defined planning tasks and created

campaign activities.

At which point will targeted customers be contacted?

- A. When the campaign is marked as launched
- B. When all the planning tasks have been completed
- C. When the campaign activities are distributed
- D. When the campaign activities are closed

Answer: C

Question: 60

Which of the following are good factors to consider when defining a consistent process for handling leads in an organization? Choose the three that apply.

- A. Defining the current process that is in place
- B. Defining a consistent process for qualifying new leads
- C. Defining what a qualified Lead is to your organization
- D. Defining a process for follow up activities for opportunities

Answer: A, B, C

Question: 61

A Sales Representative wants to send out monthly news letters to accounts located in the city of Chicago that have a minimum monthly sales revenue. Using the Microsoft CRM Advanced Find tool, the Sales Representative has saved the search criteria used to locate this information. Where will the Sales Representative pull the information from each month?

- A. The Sales Representative will have to create and save an Advanced Find search each month in order to pull the most up-to-date information.
- B. The saved Advanced Find search will be available as a Microsoft CRM report.
- C. The saved Advanced Find search will be available has a new entity located as Account details in Microsoft CRM.
- D. The saved Advanced Find search will be available under Account views in Microsoft CRM.

Answer: D

Question: 62

What benefits can an organization achieve by using the Microsoft CRM Sales Management module to follow a defined sales process? Choose the three that apply.

- A. Shorter sales cycle
- B. Inventory management
- C. Determining qualified opportunities
- D. The ability to easily pull sales information for reporting

Answer: A, C, D

Question: 63

You have been asked to implement the customer service function for your company using Microsoft CRM. You must be able to receive support requests from customers through e-mail and have the requests sent to the appropriate service representative. Which of the following features of Microsoft CRM will you need?

- A. Service scheduler
- B. Allotment Types
- C. Workflow manager
- D. Contracts

Answer: C

Question: 64

Company.com has previously booked a service. The customer calls asking to postpone the service. Which of the following are ways to accomplish this? Choose the three that apply.

- A. Delete the service activity and schedule a new appointment.
- B. Navigate to the Service Calendar, open the service activity and change the scheduling information to suit the customer.
- C. Highlight the service activity in the Service Calendar and choose reschedule.
- D. Highlight the service activity in the Service Calendar and drag it to a new time to suit the customer.

Answer: A, B, C

Question: 65

Company.com wishes to set up a new service contract with your company. The customer has two offices and wants you to track service usage for each office separately. One of the offices requires an annual service contract with no limits on the number of calls and the other office requires a contract with a maximum number of incidents. How should you create the contract?

- A. Create one contract with two contract lines.
- B. Create two contracts with one contract line each.
- C. Create one contract with one contract line.
- D. Create two contracts with two contract lines each.

Answer: B

Question: 66

The system administrator set up a public queue for customers to e-mail their support queries. Company.com calls you to ask why their support e-mail messages are not being answered. You look in the queue and see that it is empty. Which of the following should you check? Choose the two that apply.

- A. That the queue has an e-mail address
- B. Verify the queue is set to convert all incoming e-mail
- C. Whether the queue has been deactivated
- D. Whether the customer has a valid support contract

Answer: A, B

Question: 67

Company.com is implementing Microsoft CRM and its employees are sales representatives using portable computers. The sales representatives travel frequently outside of the office. Why should you select the Microsoft CRM laptop client for these users? Choose the two that apply.

- A. Multiple users can be configured to use the Microsoft CRM laptop client for Microsoft Outlook on one computer.
- B. The Microsoft CRM laptop client for Microsoft Outlook lets users work offline.
- C. Only the Microsoft CRM laptop client for Microsoft Outlook can be installed on portable computers.
- D. The user can select which records to store locally.

Answer: B, D

Question: 68

When should a campaign be marked as completed?

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- A. When all campaign activities have been closed.
- B. When all anticipated responses have been received.
- C. When criteria set in the planning phase have been met.
- D. When all campaign responses have been followed up by sales representatives.

Answer: C

Question: 69

Which of the following features of Microsoft CRM help with the planning phase of campaigns? Choose the two that apply.

- A. Sales Quotas
- B. Marketing List Member Evaluation
- C. Knowledge Base
- D. Product Catalog

Answer: B, D

Question: 70

You created a marketing list of accounts that have more than five employees. You want to refine this list to only include accounts that have more than ten employees. You open the list and select Manage Members. Which of the following options should you choose?

- A. Use Lookup to add members.
- B. Use Advanced Find to add members.
- C. Use Advanced Find to remove members.
- D. Use Advanced Find to evaluate members.

Answer: D

Question: 71

Which of the following can be added to resource groups? Choose the three that apply.

- A. Resource group
- B. Team
- C. Contact
- D. User

Answer: A, B, D

Question: 72

Company.com calls in with a complaint about the level of service that they received from your company.

Company policy is to track issues separately so that they can be escalated for resolution. What is the best way to record the complaint?

- A. Add a phone call activity to the customer's record.
- B. Create a new task for the customer.
- C. Add a note to the customer's record.
- D. Create a new case against the customer.

Answer: D

Question: 73

What is the first step when you create an Advanced Find search?

- A. Select the type of entity that you want to search in.

- B. Choose Edit Columns to select the columns you want to search in.
- C. Choose Edit properties to choose the properties you want to search in.
- D. Click the Find button to start your Advanced Find search.

Answer: A

Question: 74

You want to remove a resource for maintenance during its scheduled working hours. However, some appointments have already been scheduled that use the resource. How should you determine when the resource is free?

- A. View the calendar in Outlook.
- B. View the service calendar using the service activity view.
- C. View the service calendar using the facility/equipment view.
- D. View the calendar in My Work.

Answer: C

Question: 75

A user ran a mail-merge using a template letter for several accounts on their computer. The user complains that when they examine the activity history for each of the accounts, there is a Mail Merge Letter activity but it does not include the contents of the letter. What should you do?

- A. Make sure that the user's PC has Word 2002 or a later version.
- B. Advise the user that Microsoft CRM does not record the contents of letters created by using mail merge.
- C. Advise the user that Word documents cannot be attached to account records.
- D. Make sure that the user is using the Web Client.

Answer: B

Question: 76

Company.com has a public queue for service cases. Company policy dictates that cases in this queue that have not been resolved within three days should be moved to an escalation queue for review by the Customer Service Manager. You create a new escalation queue. Which of the following steps should you perform to configure automatic escalation?

- A. Make the Customer Service Manager the owner of the new escalation queue.
- B. Create a routing rule.
- C. Add the Service Manager's e-mail address to the escalation queue.
- D. Modify the public queue to auto-escalate.

Answer: B

Question: 77

You accepted a case from a public queue. Where can you view the case?

- A. Your In Progress queue
- B. The original public queue
- C. Your Assigned queue
- D. Workplace Activities

Answer: A

Question: 78

You want to schedule a service. Which of the following must be specified to book the service appointment?

Choose the two that apply.

- A. Subject for the appointment
- B. Customer
- C. Time
- D. Place for the service to be performed

Answer: A, C

Question: 79

Company.com calls and asks to book a service. After performing a search, it is discovered that the service the customer needs is not listed in the Service Calendar. How can the service be booked for the customer?

- A. Create an appointment for the customer and manually add in the required resources and choose Find Available Times to schedule the service.
- B. Choose schedule in the Service Calendar, manually select the relevant resources and choose Find Available Times to schedule the service.
- C. Select create a new service activity in the Service Calendar, manually select the relevant resources and manually choose a time in the scheduling information.
- D. Create a new service that has the relevant resources and schedule the service in the Service Calendar.

Answer: D

Question: 80

When a Microsoft CRM Lead is converted to a Microsoft CRM Account, which of the following is true about how the activities that occurred with that Lead are tracked in the new Account record?

- A. All Lead Activities display in the history tab of the account.
- B. All Lead Activities are deactivated with the converted lead.
- C. From the account the Lead Activities display as related activities.
- D. From the account the Lead Activities display as 'this record only' activities.

Answer: C

Question: 81

You regularly send letters to your customers using Microsoft CRM mail-merge. One of your customers has called to ask that you do not send them any more letters. How should you modify the customer record in Microsoft CRM to prevent letters from being sent to this customer?

- A. Remove the customer's record from all marketing lists.
- B. Change the customer's preferred contact method to Phone.
- C. Set the customer's Mail setting to Do Not Allow.
- D. Set the customer's Send Marketing Materials setting to No.

Answer: C

Question: 82

You are a Sales Representative meeting with a prospective customer regarding an advertisement for a new product. The sales representative wants to keep track of the information and maintain a consistent sales process.

Which record type should the sales representative create in Microsoft CRM?

- A. Lead
- B. Opportunity
- C. Quote
- D. Order

Answer: A

Question: 83

Which of the following activities/tasks can be performed on Marketing Lists in Microsoft CRM?

- A. A list can be created and refined using specific Advanced Find criteria.
- B. A list can be cleaned to remove duplicates.
- C. A list can be checked for correct addresses.
- D. Both accounts and contacts can be added to a particular list.

Answer: A

Question: 84

You have written a new knowledge base article and submitted it, the article has not been approved by your manager. In which article queue does it currently reside? Choose the three that apply.

- A. Draft
- B. Published
- C. Unapproved
- D. New

Answer: A, B, D