

# Microsoft Dynamics CRM 2016 Customization and Configuration

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### Question 1

You are adding a sub-grid to the Account form that displays data from a custom entity related to the account.

You need to identify which items you can use to display the data.

Which two items should you identify? Each correct answer presents a complete solution.

#### Options:

- A. a list
- B. a chart
- C. a dashboard
- D. an iFrame

**Answer: A, B**

#### Explanation:

A: When you are working with Marketing Lists in Dynamics CRM you may want think about additional functionalities such as adding columns to a marketing list members sub-grid, as opposed to simply out of the box Members sub-grid.

B: Charts don't just go on dashboards, they can go on the forms too. It's really just a sub-grid that displays a chart instead.

References: <http://www.powerobjects.com/2014/06/10/adding-columns-marketing-list-members-sub-grid-dynamics-crm-2013/>

<https://crmchartguy.wordpress.com/2016/01/24/charts-on-forms-or-useraccount-specific-dashboards/>

### Question 2

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.

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What are two possible ways to achieve a goal?

**Options:**

- 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: A, B**

### Question 3

You have a Dynamics CRM organization.

You have a team named Team1. All of the members of Team 1 have identical security roles.

A user named User1 has a personal view to display the records owned by Team1.

You need to ensure that all the members of Team1 can use the view.

What should you do?

**Options:**

- A. Instruct User1 to assign the personal view to the owner of Team1.
- B. Instruct the owner of Team1 to configure the filter criteria.
- C. Instruct User1 to assign the personal view to Team1.
- D. Instruct User1 to configure the filter criteria.

**Answer: C**

### Question 4

You modify the Account form to 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?

**Options:**

- A. only General, Address Info, and Reseller Info
- B. only General, Address Info, and Reseller Info, and Additional Info
- C. only General, Details, Address Info, and Reseller Info, Additional Info
- D. only General, Details, Address Info, and Reseller Info

**Answer: A**

### Question 5

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?

**Options:**

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

**Answer: B**

**Question 6**

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?

**Options:**

- 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**

**Question 7**

You have a Dynamics CRM development environment and a Dynamics CRM production environment. In both environments, your account is assigned the System Customizer security role. In the development environment, you create a custom solution that contains all of the project components deployed to the production environment. The custom solution contains an entity. In the development environment, you open the project solution that you intend to deploy to the production environment. You see the entity, but not the field. You need to ensure that you can modify the field in the development environment. What should you do?

**Options:**

- A. Ask the system administrator to assign your user the System Administrator security role, and then modify the system field.
- B. In the project solution, add a field to the entity, and then make the modification.

C. In the default solution, make the modification.

D. Use the Add Sub Components action, add the field, and then make the modification.

**Answer: B**

### 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?

**Options:**

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 Contoso. Associate the new publisher to the exciting

solution.

**Answer: C, D**

**Explanation:**

References: <https://community.dynamics.com/crm/b/cosmanscrmjourney/archive/2016/03/23/best-practices-publisher-prefix>

### Question 9

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.

**Options:**

A. tag

B. scatter

C. pie

D. funnel

E. doughnut

**Answer: C, D**

**Explanation:**

Customize by pie, bar, line, funnel charts.

Reference: <http://crmbook.powerobjects.com/basics/analytics/charts-4/>

**Question 10**

You have a Dynamics CRM development environment and a Dynamics CRM production environment.

You have a project solution in the development environment.

You need to import the solution to the production environment as a managed solution.

What should you do?

**Options:**

A. Change the options of the Import Solution dialog box to import the solution as managed.

B. Use the Package Deployer for Microsoft Dynamics CRM to import the unmanaged solution to CRM as

managed.

C. Ask a developer to change the options of the import API so that CRM imports the unmanaged solution

as managed.

D. Export an unmanaged solution and select Managed for the package type. Import the exported solution

to the production environment.

**Answer: D**

**Explanation:**

Reference: [https://technet.microsoft.com/library/dn531198.aspx#BKMK\\_ImportUpgradExportSolutions](https://technet.microsoft.com/library/dn531198.aspx#BKMK_ImportUpgradExportSolutions)

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