Microsoft Dynamics CRM 2016 Sales

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Question 1

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.

Options:

A. Email the Fetch XML file.

B. Share the view.

C. Email a link from the Advanced Find ribbon.

D. Assign the view.

Answer: B, D

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.
References: https://technet.microsoft.com/en-us/library/dn509578.aspx
http://ledgeviewpartners.com/blog/sharing-personal-views-dynamics-crm/

Question 2

You have a Dynamics CRM organization that uses Microsoft Social Engagement.
You need to analyze the sales pipeline and the social sentiment to watch for social trends that affect sales.
What should you do?

Options:

A. Configure a link to CRM in Microsoft Social Engagement, and then build an interactive dashboard.

B. Build a dashboard that has a chart for the pipeline and a widget from Microsoft Social Engagement.

C. Build a multi-stream dashboard that has a global filter.

D. Configure a link to CRM in Microsoft Social Engagement, and then build a personal view.

Answer: B

Explanation:
Microsoft Dynamics CRM Online users can add Microsoft Social Engagement charts and visuals to dashboards, or you can add them to account, contact, or competitor screens. You can also add Microsoft Social Engagement charts and visuals to other types of records.
References: https://www.microsoft.com/en-us/dynamics/crm-customer-center/add-social-engagement-visuals-to-a-dashboard-or-account.aspx

Question 3

You have a Dynamics CRM organization that has more than 200 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 identify?

Options:

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.
References: https://msdn.microsoft.com/en-us/library/gg309258.aspx

Question 4

You need to create a goal that will show the previous seven days of activity.
Which two actions should you perform? Each correct answer presents part of the solution.

Options:

A. Close the goal after seven days.

B. Add a filter.

C. Set the goal period as a Custom Period.

D. Add a rollup field.

E. Add a rollup query.

Answer: C, E

Explanation:
A Rollup Field has the following functions:
1. The record on which goal is based.
2. The attribute in the record which contributes towards the target set in the goal
3. The date type attribute which is compared against the timelines of the goal to decide if a record contributes towards this goal or not.
4. The value of state/status that the record should have in order to be able to contribute towards a goal.
References: https://blogs.msdn.microsoft.com/crm/2010/11/23/goal-management-behind-the-scenes/

Question 5

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?

Options:

A. Adobe PDF

B. Microsoft Word

C. Microsoft PowerPoint

D. Microsoft Visio

Answer: B

Explanation:
Word Templates can be used similar to the standard out of the box reports as a way of giving and distributing information. These types of reports can be styled how you wish (and using the limits of Microsoft Word) but with little effort can look much nicer whilst still taking less time and money creating more complex reporting through SSRS for example.
References: https://community.dynamics.com/crm/b/crmcat/archive/2016/01/01/the-new-features-of-dynamics-crm-2016-amp-how-to-use-them

Question 6

You are reviewing the sales pipeline of your Dynamics CRM organization.
You need to identify which type of data is contained in the sales pipeline.
What should you identify?

Options:

A. the combined estimated revenue of all active quotes

B. the combined estimated revenue of all open leads

C. the combined estimated revenue of all open opportunities

D. the combined estimated revenue of all open orders

Answer: C

Explanation:
Estimated Revenue: This field feeds the sales pipeline. Once an opportunity is won or lost, users can enter Actual Revenue.
Probability: If required by your organization, you can enter any number between 0 and 100. Many organizations choose to customize Probability by creating a dropdown; thereby limiting the amount of entries.
References: http://crmbook.powerobjects.com/basics/microsoft-dynamics-crm-sales-process/opportunities/

Question 7

You have 20 sales representatives who each has a monthly goal that measures the number of phone calls made to their 10 key customers. The managers of the sales representatives want you to add parent goals that track this activity over the next three weeks for an internal competition.
You need to use a parent goal to track the team score, and child goals to track the individual scores.
Which two configurations should you perform? Each correct answer presents part of the solution.

Options:

A. Create new child goals that all use the same rollup queries.

B. Change the parent goal of each child goal.

C. Create a parent goal that has a custom period of three weeks from today.

D. Change the manager of each child goal.

E. Change the goal manager of each child goal.

Answer: A, C

Explanation:
The goal rollup is done from the bottom of the hierarchy to the top of the hierarchy. During rollup, the child goal totals are rolled into the parent goal totals. The ending total for the root goal at the top of hierarchy is a cumulative sum of all goal totals in the hierarchy.
References: https://msdn.microsoft.com/en-us/library/gg309258.aspx

Question 8

Your 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?

Options:

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:
References: https://www.microsoft.com/en-us/dynamics/crm-customer-center/create-edit-or-copy-a-report-using-the-report-wizard.aspx

Question 9

You work for a company named Fabrikam, Inc.
Fabrikam is acquired by a company named Contoso, Ltd. Both companies have different fiscal year ends.
The sales team at Fabrikam will be required to use a new fiscal year end at the end of the current quarter.
The Dynamics CRM administrator at Fabrikam updates the Fiscal Year Settings immediately.
You need to ensure that reports on the goals use the Fabrikam year end until the end of the quarter.
What should you do?

Options:

A. Run the Align with Fiscal Period action immediately.

B. Recalculate the goals.

C. Run the Align the Fiscal Period action after the quarter ends.

D. Create new goals for the old fiscal period.

Answer: C

Question 10

You have a Dynamics CRM organization that has 50 000 contacts in regions around the world.
Your job is to review the records of the contacts from three regions. The contacts in the three regions are managed by different account managers. You work with only one of the regions per day, updating the address information of the contacts in that region.
You need to view only the contacts from a specific region.
What should you do?

Options:

A. Follow the contact records.

B. Add access teams.

C. Create a dashboard.

D. Create personal views.

Answer: D