



# MB2-713<sup>Q&As</sup>

Microsoft Dynamics CRM 2016 Sales

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### QUESTION 1

Your company employs consultants who bill customers for their time. Your sales team is responsible for selling the consultants' time, in addition to selling product licenses. You need to provide the sales team with the ability to create opportunities, quotes, and invoices for the consultant's time.

What should you create first?

- A. a product family
- B. a price list
- C. a product bundle
- D. a unit group

Correct Answer: D

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### 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?

- 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.

Correct Answer: B

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### QUESTION 3

You have two opportunities named Opp1 and Opp2 that are created for a customer. The customer requests a single quote that contains the line items from both opportunities. From Opp1, you generate a new quote that contains all of the line items

in Opp1. You need to add the line items in Opp2 to the quote.

What should you do?

- A. From Opp2, Click Assign
- B. From Opp2, Click New Quote
- C. From the quote, Click Get Products
- D. From the quote, associate the quote to Opp2



Correct Answer: C

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#### QUESTION 4

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

Correct Answer: B

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#### QUESTION 5

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.

- 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.

Correct Answer: AC

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#### QUESTION 6

Your company purchases a mailing list of purchasing managers at the companies in your area. You contact the purchasing managers. You gather information about their budget and timelines. You conclude that their companies are a good fit

for a product that you sell. You need to advance the sale and provide data for sales pipeline tracking to your sales managers.

What should you do next?

- A. Add a lead to a marketing list.
- B. Generate a quote.



- C. Populate the Develop section of the lead business process flow.
- D. Qualify a lead.

Correct Answer: C

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#### QUESTION 7

You recently visited a trade show and you interacted with many potential customers. As a vendor at the trade show, you receive a CSV file that contains detailed information about the 643 attendees who showed interest in your products.

You need to efficiently and accurately input this information into Dynamics CRM for future use in the sales process.

Which method should you use?

- A. Import the details as new activates.
- B. Import the details as new leads.
- C. Update opportunities to reflect new prospects.
- D. Import the information as part of a solution file.

Correct Answer: B

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#### QUESTION 8

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 sale 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 of configurations should you perform? Each correct answer presents part of the solution.

- A. 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.

Correct Answer: BC

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#### QUESTION 9

You have a Dynamics CRM organization, You have account records for three companies named Company1, Subsidiary 1, and Subsidiary2. Subsidiary 1 has Company1 as a parent account. Subsidiary2 has Subsidiary1 as a parent



account.

Subsidiary2 has an open opportunity of \$500,000. There are no other open opportunities of the three companies. You need to identify what open revenue will be displayed for the companies when you view the hierarchy.

What should you identify?

- A. Company1:\$500.000 Subsidiary1: \$0 Subsidiary2:\$500.000
- B. Company1: \$0 Subsidiary1: 0 Subsidiary2:\$500,000
- C. Company1: \$500,000 Subsidiary1:\$500.000 Subsidiary2:\$500,000
- D. Company1: \$0 Subsidiary1:\$500.000 Subsidiary1:\$500.000

Correct Answer: C

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#### QUESTION 10

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.

Correct Answer: C

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#### QUESTION 11

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?

- A. the combined estimated revenue of all active quotes
- B. the combined estimated revenue of all open leads
- B. the combined estimated revenue of all open opportunities
- C. the combined estimated revenue of all open orders

Correct Answer: C

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#### QUESTION 12

You have a recalled product that should no longer be sold.



You need to remove the Product from the available list of products and to prevent any sales from being processed for the product.

Which two actions should you perform? Each correct answer presents part of the solution.

- A. Remove the product from the family hierarchy.
- B. Modify the open opportunities.
- C. Update the price list.
- D. Retire the product.
- E. Modify the validity date of the product.

Correct Answer: BD

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