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Microsoft Dynamics CRM Customization and Configuration

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QUESTION 1

All users in your organization share a security role named Contoso Employee. The only current Account form is assigned to that role and is configured as a fallback. The marketing team has an additional security role named Contoso

Marketing, and your support team has an additional security role named Contoso Support.

You need to create a new form for the marketing team.

You have the following requirements:

The form must be the only form available to the marketing team. The support team must have access to this new form and the current form.

What should you do?

A. Assign the new form to Contoso Marketing and Contoso Support. Then remove Contoso Employee from the current form, and assign Contoso Support to it

B. Assign the new form to Contoso Support and Contoso Marketing, and remove Contoso Employee from the current form.

C. Assign the new form to the Contoso Marketing security role, and configure it as the fallback. Then remove Contoso Employee from the current form.

D. Assign the new form to Contoso Marketing, and configure it as the fallback. Then add Contoso Support to the current form after removing Contoso Employee.

Correct Answer: A

QUESTION 2

You are performing an initial deployment of Microsoft Dynamics CRM. You create a view named Local Contacts.

You want this view to be the default view for all users.

What should you do?

A. From the customization area, select the System View, and select Set Default

B. Under system settings, configure the System View as default view for all users.

C. While viewing the System View, put the view to set it as default for all users.

D. When creating the System View, select the Default View type before saving the view.

Correct Answer: A

http://www.microsoft.com/en-US/dynamics/crm-customer-center/create-or-edit- a-public-view-for-an-entity.aspx

QUESTION 3

You are customizing Microsoft Dynamics CRM.

You want to create a new custom entity Project You need to be able to assign owner teams to it.

Which ownership type should you use?

A. Access team

B. Organization

C. Owner team

D. User or team

Correct Answer: D

QUESTION 4

You are configuring user access in Microsoft Dynamics CRM.

You need each account to have a unique group of people who have write permissions to the account. What should you do?

A. Have Dynamics CRM automatically create access teams for each record, and manually share the account with the appropriate

B. Create an owner team, and assign the accounts to the owner team.

C. Create an access team template, and add to the account form a sub-grid that references the access team template.

D. Manually create an access team record for each account and assign the account to the access team.

Correct Answer: D

QUESTION 5

You are a customer service manager. You create a personal dashboard that contains one system chart and two personal views.

You need to make this dashboard available to the rest of the organization.

What should you do?

A. Assign a security role to your dashboard, and then assign the security role to the rest of the users or teams in the organization.

B. Convert the personal dashboard to a system dashboard, and then publish it.

C. Share your personal dashboard and the two personal views with the rest of the users or teams in the organization.

D. Add your personal dashboard to a Solution and export it Re-import it as a system dashboard.

Correct Answer: C

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