



MB2-707^{Q&As}

Microsoft Dynamics CRM Customization and Configuration

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QUESTION 1

You are adding a calculated field to the account entity.

Which two fields can you include in the field calculation? Each correct answer presents part of the solution. Choose two.

- A. Fields on a related quote
- B. Fields on the account
- C. Fields on a related opportunity
- D. Fields on the related parent account

Correct Answer: BD

Ref:<https://technet.microsoft.com/en-us/library/dn832103.aspx>

QUESTION 2

Users at your company do not need the No Orders in Last 6 Months option in the public view accounts. You need to remove this view from the list of views. What should you do?

- A. Deactivate the view from system settings.
- B. Delete the view from the customizations area.
- C. Deactivate the view from the customizations area.
- D. Delete the view from system settings.

Correct Answer: C

Ref:https://technet.microsoft.com/en-us/library/dn509578.aspx#BKMK_TypesOfViews

QUESTION 3

You are a Microsoft Dynamics CRM specialist for an organization. The marketing and sales teams at the organization exist within different business units.

Your organization decides that a marketing employee's personal chart could be very useful to the sales team.

You need to distribute this chart to the sales team but not to the marketing team. No users currently have privileges to create personal charts.

What should you do?

- A. Share the chart with the sales team.
- B. Copy the chart by using Save As, and assign the copy to the sales team business unit.



- C. Export the chart and distribute the file to sales team users.
- D. Convert the chart into a system chart.

Correct Answer: A

<http://blog.crmguru.co.uk/2015/02/05/special-privileges-in-crm-security-roles/>

QUESTION 4

An Account record has an Option Set named Relationship Type.

You need to ensure that when the Relationship Type is not Customer, the Account Number field does not display.

What should you do?

- A. Use business rules.
- B. Create a dialog.
- C. Create a real-time workflow.
- D. Configure the business process flow.

Correct Answer: A

Ref:<https://crmbusiness.wordpress.com/2014/10/20/crm-2013- understanding-business-rules/>

QUESTION 5

On the Account record in Microsoft Dynamics CRM, you create business rules that update the Credit Limit based on the Relationship Type option set. After which two user actions do these business rules apply? Each correct answer presents a complete solution. Choose two.

- A. Saving an Account
- B. Changing a Relationship Type on an existing Account
- C. Adding a Relationship Type to a new Account
- D. Deleting an Account

Correct Answer: BC

Ref:<https://technet.microsoft.com/en-us/library/dn531086.aspx>

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