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MB2-707 Q&As

Microsoft Dynamics CRM Customization and Configuration

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Exam Code: MB2-707

Exam Name: Microsoft Dynamics CRM Customization and Configuration

Q&As: Demo

QUESTION 1
You are adding a Personal Identification Number field to the contact entity.

Users should be able to add data to this field when a contact record is created but should not be able to read or modify it after the contact is created.

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

A. Enable field security on the Personal Identification Number field customization.
B. In the users' Security Role, grant an Organization level Create permission for the Contact entity.
C. In the field security profile for the users, set the Personal Identification Number Create permission to Yes, the Update permission to Yes, and the Read permission to No.
D. In the field security profile for the users, set the Personal Identification Number Create field permission to Yes, the Update permission to No, and the Read permission to No.

Correct Answer: AD

QUESTION 2
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 secunty 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 3
You are creating a new business process flow for a custom Event entity.

You create the new process and select business process flow from the Category list but you cannot find the Event entity in the Entity list.

What should you do?

A. Activate the new business process flow to refresh the Entity list
B. Save the new business process flow to refresh the Entity list.
C. Configure the entity to display in the Settings area, and then publish it
D. Configure the entity to enable business process flows, and then publish it

Correct Answer: D

QUESTION 4
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

QUESTION 5
You create a new custom entity named Project. It has a lookup to Account.

You create a field that maps from the City field on the Account to the Location field on the Project.

What should a user do to apply the mapping?

A. Create a new Account. From the Account create the new project.
B. Look up an existing Account. From the Account record, add an existing project
C. Create a new Project. Using the Account lookup, select an existing Account.
D. Create a new Project. Using the Account lookup, create a new Account.

Correct Answer: A

QUESTION 6
You need to convert a personal chart to a system chart in Microsoft Dynamics CRM?

What should you do?

A. Export the chart from the chart pane, and import it into the entity customization chart area.
B. Create a solution that includes the personal chart and import the solution to create the system chart.
C. Go to the entity customization, and recreate the chart as a system chart.
D. Share the chart with all other Dynamics CRM users to convert it to a system chart.

Correct Answer: A

QUESTION 7
You want to add a drop-down list control on a form to present a fixed list of choices to the user.

Which Data Type should you use?

A. Lookup
B. Option Set
C. Picklist
D. Multiple Lines of Text

Correct Answer: B

QUESTION 8
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

QUESTION 9
You create several additional attributes in Microsoft Dynamics CRM.

Which two field requirement levels can be set? Each correct answer presents a complete solution. Choose two.

A. Business Required
B. System Recommended
C. System Required
D. Business Recommended

Correct Answer: AD

QUESTION 10
You are developing a Microsoft Dynamics CRM solution for a company. Your solution utilizes an HTML Web Resource on the Account form.

Company employees use Microsoft Dynamics CRM Mobile client for iPad, Android, and Windows.

How will this environment affect the user experience?

A. The users will not be able to view the Web Resource and will need to use the desktop client instead.
B. The users can view the Web Resource, as long as it is within one of the first five tabs of the default form.
C. The users will have to download and install an update rollup in order to view the Web Resource.
D. The users will not be able to use the Web Resource until their security role is updated with ISV Customizations privileges.

Correct Answer: A

QUESTION 11
You create a new business process flow on the account entity for your inside sales team. The business process flow has four stages. The first stage contains three fields from the account entity. All of these fields are required in the business process flow, and one field is read-only because of field security.

A salesperson reports that no one can move past the first stage.

You need to resolve this issue.

What should you do?

A. Create a security role that grants the inside sales team the ability to read and update the account entity.
B. Create a field security profile for the inside sales team that grants them the ability to read all of the fields in the first stage.
C. Create a field security profile for the inside sales team that grants them the ability to update the read-only field in the first stage.

D. Modify the existing inside sales team's security role and mark the Activate Business Process Flows Miscellaneous Privilege.

Correct Answer: C

QUESTION 12
You are customizing Microsoft Dynamics CRM. You modify a sub-grid on the Account form to display field changes to a view from the Contact entity.

You publish the changes to the Account entity and then add all of the necessary components to a solution. You export the solution from the development environment, import it into the production environment and publish all changes.

Users report that they cannot see the changes made to the sub-grid view on the Account form.

Which two actions would have prevented this problem? Each correct answer presents a complete solution. Choose two.

A. Creating the new solution as a managed solution before exporting from the development environment
B. Publishing all components before exporting the solution from the development environment
C. Publishing the contact entity before exporting the new solution from the development environment
D. Scheduling the import and publishing of the solution in production to prevent it from disrupting normal system operation

Correct Answer: BC

QUESTION 13
You want to add a custom attribute for alphanumeric values. This attribute should be displayed on the form as multiline control.

Which two Data Types should you use? Each correct answer presents a complete solution.
Choose two.

A. Single Line of Text (Format: Text Area)
B. Lookup
C. Option Set
D. Multiple Lines of Text

Correct Answer: AD

QUESTION 14
A business services customer reports issues with a case entity.

You have two support tiers. Your support users are grouped by their tiers into separate business units, security roles, and teams.

You want to create a business process flow that is unique for each support tier, with tier- specific fields and stages on the case entity.

You do not want to allow your first-tier users to use the second-tier process flow.

What should you do?

A. Create two business process flows and two main forms. Enable one form for each tier's security role. Then associate the corresponding business process flow with its form.
B. Create two business process flows. Assign the first support-tier security role to the first- tier business process flow only. Enable the second support-tier security role for both business process flows.
C. Create two business process flows. Make the second-tier team the owner of the second- tier business process flow, and make the first-tier team the owner of the first-tier business process flow.
D. Create one business process flow. Configure it with branches into two separate stage paths,

depending on the business unit related to the user working on the case.

Correct Answer: B

QUESTION 15
A salesperson reports that quick find searches on accounts are taking too long.

Which two best practices should you suggest to the salesperson? Each correct answer presents a complete solution. Choose two.

A. Add a find field to the view.
B. Ensure there is not an asterisk (*) at the beginning of the search term.
C. Ensure there is an asterisk (*) at the beginning of the search term.
D. Create a personal view.

Correct Answer: BD

QUESTION 16
You are configuring a sales process in Microsoft Dynamics CRM.

The sales process needs to have an additional stage if the probability field value is greater than 50%.

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

A. Add a branch rule to define the condition that should display the high probability stage.
B. Add a stage to the branch for the high probability opportunity condition.
C. Create a business process flow for your sales process.
D. Create a business rule to conditionally switch between business process flows if the probability is greater than 50%.
E. Create a second business process flow for the high probability opportunities.

Correct Answer: ABC

QUESTION 17
You need to create a solution file to import into another environment.

What are two possible ways to achieve this goal? Each correct answer presents a complete solution. Choose two.

A. Create a managed solution file by exporting an unmanaged solution as Managed Solution.
B. Create an unmanaged solution file by exporting an unmanaged solution as Unmanaged Solution.
C. Create a managed solution file by exporting a managed solution as Managed Solution.
D. Create an unmanaged solution file by exporting a managed solution as Unmanaged Solution.

Correct Answer: AB

QUESTION 18
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

QUESTION 19
You are creating a security role in Microsoft Dynamics CRM.

You want users with the role to be able to add notes to cases.

Which two privileges should you add to the role? Each correct answer presents part of the solution. Choose two.

A. Append privilege on cases
B. Append privilege on notes
C. Append To privilege on cases
D. Append To privilege on notes

Correct Answer: BC

QUESTION 20
You are creating a custom entity named Transaction. This entity needs to be an available activity that you can create from the contact entity.

What should you do to configure the entity?

A. Create a 1:N relationship between the contact and transaction entities.
B. Check the Display inactivity menus check box on the transaction entity customization form.
C. Check the Define as an activity entity check box on the transaction entity customization form.
D. Check the Activities check box on the transaction entity customization form.

Correct Answer: C