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Exam   :   **MB2-423**

Title   :   CRM 3.0 Applications

Version   :   DEMO

1.A user ran a mail-merge using a template letter for several accounts on their computer. The user complains that when they examine the activity history for each of the accounts, there is a Mail Merge Letter activity but it does not include the contents of the letter. What should you do?

A.Make sure that the user's PC has Word 2002 or a later version.

B.Advise the user that Microsoft CRM does not record the contents of letters created by using mail merge.

C.Advise the user that Word documents cannot be attached to account records.

D.Make sure that the user is using the Web Client.

Correct:B

2.Which of the following are characteristics of contacts in Microsoft CRM? Choose the 3 that apply.

A.A contact must have a parent account.

B.A contact can have sub-contacts.

C.An account does not have to have a contact.

D.A contact can only have one parent account.

Correct:B C D

3.Which of the following records are synchronized between Microsoft Outlook and Microsoft CRM? Choose the 2 that apply.

A.Contacts

B.Accounts

C.Notes

D.Tasks

Correct:A D

4.Which of the following record types cannot be used with a contact record to create a relationship role?

A.Account

B.Opportunity

C.Contact

D.Lead

Correct:D

5.You have an opportunity with a customer to sell a range of products. The customer has an account record in the Microsoft CRM database and has informed you they have hired a consultant to help them decide whether to buy the products from your company. You want to add this consultant to the Microsoft CRM system, and record that he is advising your customer on this purchase. What should you do?

A.Create a new account for the consultant. Make the new account a sub-account of each customer's account.

B.Add the consultant as a new contact under each customer's account.

C.Create a new contact for the consultant. Create a relationship role called Consultant that enables a contact to be linked to an opportunity. In each opportunity, add a new relationship to the consultant contact using the Consultant relationship role.

D.Create a new contact for the Consultant. Create a relationship role called Consultant that enables a contact to be linked to an account. In the account record for each customer add a new relationship to the consultant contact using the Consultant relationship role.

Correct:C

6.A user complains that the Marketing group does not appear in the Workplace. You discover that the user is using the Microsoft CRM laptop client for Outlook when offline. You need to make sure that the user can see the Marketing group in their Workplace. What should you do?

A.Make sure that the user has selected Marketing in Personal Options.

B.Give the user access to the Marketing module using System Settings.

C.Advise the user that the Marketing module is unavailable in the Microsoft CRM laptop client for Outlook.

D.Instruct the user to go online.

Correct:A

7.Which of the following tasks can be completed using features of Microsoft?CRM? Choose the 3 that apply.

A.Preparing profit and loss forecasts

B.Sending e-mail messages to lists of accounts or contacts

C.Setting up and scheduling services offered by a company

D.Running marketing campaigns

Correct:B C D

8.You regularly send letters to your customers using Microsoft CRM mail-merge. One of your customers has called to ask that you do not send them any more letters. How should you modify the customer record in Microsoft CRM to prevent letters from being sent to this customer?

A.Remove the customer's record from all marketing lists.

B.Change the customer's preferred contact method to Phone.

C.Set the customer's Mail setting to Do Not Allow.

D.Set the customer's Send Marketing Materials setting to No.

Correct:C

9.A Sales Representative received an e-mail from a client accepting a recent quote they received for a product. This action should be tracked in Microsoft CRM. What is the next action that should be taken to move to the next stage of the sales process?

A.Add an activity to the quote and convert it to an order.

B.Create a new Microsoft CRM invoice for the new product.

C.Revise the quote and add an activity.

D.Convert the quote to an Order and enter the won details in the dialog box.

Correct:D

10.Which record types can be created when a lead is converted? Choose the 2 that apply.

A.Account

B.Order

C.Opportunity

D.Quote

Correct:A C

11.You want to send e-mail to all customers in a particular city informing them about a new promotion. What is the fastest way to do this?

A.Run the Sales History report to create a list of customers and for each account in the results list, open the account and add an e-mail activity.

B.Add each customer to a new Marketing List and then use the new list to create a Quick Campaign to generate e-mail activities.

C.Use Advanced Find to create a list of customers and then create a Quick Campaign for all records on

all pages to generate e-mail activities.

D.Use Advanced Find to create a list of customers and for each account in the results list open the account and add an e-mail activity.

Correct:C

12.With which of the following records can sales literature be associated? Choose the 2 that apply.

A.Products

B.Quotes

C.Accounts

D.Competitors

Correct:A D

13.A Sales Representative has just received a request for more information about a new product from an existing Microsoft CRM Lead. The Sales Representative must convert the Lead record. Which records can the Sales Representative select when converting a Lead record? Choose the 3 that apply.

A.Opportunity

B.Quote

C.Contact

D.Account

Correct:A C D

14.As a Sales Manager using Microsoft CRM you want to see what types of Leads result in the most opportunities. What is the most efficient way to obtain this information from Microsoft CRM?

A.Create a new marketing campaign.

B.Create a new View for Lead Types.

C.Create a Microsoft CRM Advanced Find search.

D.Run the Microsoft CRM Lead Source Effectiveness Report.

Correct:D

15.In speaking with potential customers, the Sales Manager notices that several key opportunities have been lost and discovers that the customers purchased products from a rival company. The Sales Manager asks you, the Sales Representative, to add information about the rival company and why each opportunity was lost to the CRM database. The Sales Manager wants the information to be available to other sales representatives when they deal with these customers. How should you do this?

A.Add the rival company as a new account, link this account to each customer's account using a relationship role and add a note against each customer account together with a description of why the opportunity was lost.

B.Add the rival company as a new competitor, reopen the lost opportunities, add the new competitor record to each one of the lost opportunities and close each opportunity with a description of why it was lost.

C.Add the rival company as a new competitor and add a note against this record with a description of why each opportunity was lost.

D.Add a note against each customer detailing the rival company and why the opportunity was lost.

Correct:B

16.When a Microsoft CRM Lead is converted to a Microsoft CRM Account, which of the following is true about how the activities that occurred with that Lead are tracked in the new Account record?

A.All Lead Activities display in the history tab of the account.

B.All Lead Activities are deactivated with the converted lead.

C.From the account the Lead Activities display as related activities.

D.From the account the Lead Activities display as 'this record only' activities.

Correct:C

17.The Vice President of Sales wants to organize his sales force on a geographical basis for reporting purposes. Which of the following features of Microsoft CRM should be used?

A.Quotas

B.Sites

C.Teams

D.Territories

Correct:D

18.Your company has decided to designate certain customers as preferred customers. You have been asked to configure the Microsoft CRM system so that preferred customers are always quoted at 90% of the list price for all products. What steps must you take in order to accomplish this? Choose the 2 that apply.

A.Create a new price list called Preferred, set this list as the default price list for all preferred customers and add all products to the price list.

B.Create a discount list called Preferred, associate this list with each of the preferred customers.

C.Configure the pricing method as percentage of list set to 90%.

D.Configure the pricing method as currency amount calculated at 90% of the list price.

Correct:A C

19.A Sales Representative wants to send out monthly news letters to accounts located in the city of Chicago that have a minimum monthly sales revenue. Using the Microsoft CRM Advanced Find tool, the Sales Representative has saved the search criteria used to locate this information. Where will the Sales Representative pull the information from each month?

A.The Sales Representative will have to create and save an Advanced Find search each month in order to pull the most up-to-date information.

B.The saved Advanced Find search will be available as a Microsoft CRM report.

C.The saved Advanced Find search will be available has a new entity located as Account details in Microsoft CRM.

D.The saved Advanced Find search will be available under Account views in Microsoft CRM.

Correct:D

20.You are a Sales Representative and receive an e-mail from an existing account that wants more information about a new product line. You want to enter the information in Microsoft CRM. Which Microsoft CRM record should you create to capture this information?

A.Lead

B.Opportunity

C.Quote

D.Order

Correct:B