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Assign the view.Answer: BD Explanation: B: Personal views are owned by individuals and, because of their default User level access, they are visible only to that person or anyone else they choose to share their personal views with. D: When you have your view to share go ahead and click on the Assign Saved Views button and you will notice another popup appears. Choose the Assign to another user or team radio button and perform a look up for the user or team you are going to assign the view to. https://technet.microsoft.com/en-us/library/dn509578.aspx http://ledgeviewpartners.com/blog/sharing-personal-views-dynamics-crm/ QUESTION 12 Your company has a Dynamics CRM organization. The company plans to use the product catalog. You need to identify which component must be configured before you can implement the product catalog. A. product families B. product C. price lists D. unit groups Answer: D Explanation: The product catalog is a collection of products and their pricing information. To set up pricing, you need to define the units in which your products are sold, the amount to charge for each unit, and the discounts you want to offer based on volume purchased. https://www.microsoft.com/en-us/dynamics/crm-customer-center/create-a-unit-group-and-add-units-to-that-group.aspx QUESTION 13 Your company uses Dynamics CRM Online. You need to provide Dynamics CRM users with the ability to collaborate on CRM data, meetings, and notes with users who do not have a CRM account. Which two actions should you perform? Each correct answer presents part of the solution, A. Install the Microsoft Office 365 Groups solution. B. Create a Microsoft SharePoint document library. C. Enable integration with Microsoft OneDrive for Business. D. Configure Microsoft SharePoint server-based integration. E. Configure the Microsoft Office 365 Group Settings Answer: AE Explanation: A: Office 365 Groups are a shared workspace for email, conversations, files, and events where group members can collectively get stuff done. You can use groups to collaborate with people across your company, even if they don't have access to Microsoft Dynamics CRM Online. Before you can start using Office 365 Groups, the groups solution needs to be deployed and turned on for your CRM entities. Provision Office 365 Groups 1. Browse to the Office 365 admin center and sign in using Office 365 Global administrator credentials. 2. Click Admin > CRM. 3. Click the Instances tab. 4. Choose your instance, and then click Solutions. 5. Select Office 365 Groups and then click Install. 6. Review the terms of service and then click Install. You can configure OneNote in CRM Online when you're also using SharePoint Online. You must have a subscription to Office 365 to use OneNote in CRM Online. E: Configure Office 365 Groups Once you provision Office 365 Groups, you can enable them for any entity. Security group membership is associated with the entity. You configure Office 365 Groups in CRM Online. 1. In CRM Online, click Settings > Office 365 Groups. 2. On the Office 365 Groups Settings page, click Add properties button Add entity and choose an entity from the drop-down list. Repeat this step for each entity you want to enable, including custom entities. Etc. https://technet.microsoft.com/library/dn896591.aspx QUESTION 14 Your marketing team is promoting a sale that they will announce by using email. The email message will be sent to existing customers who recently purchased similar products and to potential customers from a purchased mailing list. Any sales made as a result of the sale need to have the pricing applied, the sales must be tracked so that the marketing team can report on the return on investment (ROl) of the initiative. What are two possible ways to achieve the goal? Each correct answer presents a complete solution. A. Convert the email activities to leads. B. Convert the campaign response activities to opportunities. C. Convert the campaign response activities to leads. D. Convert the email activities to opportunities. Answer: BD Explanation: Opportunities in Microsoft Dynamics CRM are the core record in the sales process. Used by the sales team, opportunities represent a potential sale for a specific customer. The creation of an opportunity adds this potential sale to the sales pipeline and therefore puts it on the radar of the sales manager who may be holding the team responsible for the progress of opportunities. Incorrect Answers: A, C: A lead represents any person or organization that a company might have the potential to do business with. http://crmbook.powerobjects.com/basics/microsoft-dynamics-crm-sales-process/opportunities/ QUESTION 15 You have a Dynamics CRM organization that uses Microsoft OneNote integration. A user named User1 enters some information in a OneNote notebook for an account record named Account. User1 owns the record for Account 1. You need to identify who can open the notebook tor Account1 directly from OneNote. Who should you identify? A. all of the users who can view a notebook in CRM B.

only User1 C. all of the users who have Read access to Account1 in CRM D. all of the users who can add notes ro Account1 in CRM Answer: C QUESTION 16 You quality a lead for a business account. After several conversations with the business contact you discover that the business used a different vendor. Which record should you deactivate? A. opportunity B. lead C. contact D. account Answer: A Explanation: After you determine whether the prospective customer or an existing customer wants to purchase your product or service, you may close an opportunity. By closing an opportunity, you deactivate it, but you do not delete it. This gives you an option to reopen it later. When you close an opportunity, an opportunity close activity is created. It is represented by the opportunity close entity. You can use this entity to store information about the revenue, why you closed the opportunity, close date, and the competitor. It also contains the information about the user that created the opportunity. https://msdn.microsoft.com/en-us/library/gg334362.aspx QUESTION 17 You need to identify which type of object can be associated to sales territories. Which type of object should you identify? A. Opportunities B. Users C. Leads D. Facilities E. Teams Answer: B Explanation: To assign members to a sales territory, open the territory, and then in the left pane, under Common, choose Members. On the Users tab, in the Records group, choose Add Members. In the Look Up Records dialog box, select a user, and then choose Add. https://www.microsoft.com/en-us/dynamics/crm-customer-center/set-up-sales-territories-to-organize-business-markets-by-geographical-area.aspx QUESTION 18 You create an Advanced Find that displays all of the open opportunities containing a specific line item. You need to edit some of the records returned from the Advanced Find by using immersive Excel. What should you do first? A. Click Export to Excel B. Click Download Fetch XML C. Save the Advanced Find as a view. D. Create a Microsoft Excel template. Answer: C Explanation: With immersive Excel you bring in Excel capabilities into CRM: Users can do all the major features expected on excel (e.g.: filters, pivot tables, charts, etc.), as they did before on real-time data, but now without leaving CRM web interface and having to export views as excel files. Always start Immersive Excel from a full CRM view: If Advanced Find is used to get the date to bulk update, save as a view first. https://community.dynamics.com/crm/b/mscrmdaily/archive/2015/04/18/2015-update-1-immersive-excel QUESTION 19 Your company uses seminars and trade shows as its two primary methods to generate leads. You want to analyze which method generates the most leads. You generate a report that displays the number leads generated from trade shows and the number of leads generated from seminars. Which report should you use? A. Sales Pipeline B. Neglected Leads C. Lead Source Effectiveness D. Sales History Answer: C Explanation: Lead Source Effectiveness report Find out which type of lead is most beneficial in helping you grow your business. This report helps you compare how effective your lead sources are at generating quality opportunities. The report lists the percentage of qualified leads, and leads that generate revenue for each lead category. https://www.microsoft.com/en-us/dynamics/crm-customer-center/lead-source-effectiveness-report.aspx QUESTION 20 You create a new mailbox record for a user. You define the synchronization methods for incoming and outgoing email, contacts, tasks, and appointments. You need to ensure that the mailbox can send and receive email. Which two actions should you perform? Each answer presents part of the solution. A. Set the Is forward Mailbox setting to No. B. Configure the Approve Email setting. C. Configure the Test & Enable Mailboxes setting. D. Configure the Apply Default Email Settings setting. E. Set the Is Forward Mailbox setting to Yes. Answer: AC Explanation: C: You only need to test and enable a mailbox if you're using server-side synchronization as your synchronization method. You don't need to test and enable a mailbox if you're using CRM for Outlook or the Email Router for synchronization purposes. Every user in CRM gets a CRM mailbox by default. After your mailbox is set up, to synchronize it with an email server (Exchange or POP3) using server-side synchronization, you have to click the Test & Enable Mailbox button to make sure the mailbox is linked and configured correctly. A: You can use mailbox monitoring to poll one or more mailboxes for incoming email messages, and then determine what actions Microsoft Dynamics CRM will take based on the email message, such as create or update records in the system. You can configure server-side synchronization or the Email Router to monitor either of the following: A forward mailbox. This is a single, central mailbox. The mailbox for each user or queue. If you administer an organization that has to monitor a large number of mailboxes, you should consider using a forward mailbox to reduce the administrative effort. Monitoring many mailboxes can sometimes require maintaining access credentials in many incoming configuration profiles.
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https://technet.microsoft.com/en-us/library/hh699793.aspx Always up-to-date Lead2pass MB2-713 VCE - everything you need for your Microsoft MB2-713 exam to pass. Our Microsoft MB2-713 software allows you to practise exam dumps in real MB2-713 exam environment. Welcome to choose. MB2-713 new questions on Google Drive: https://drive.google.com/open?id=0B3Syig5i8gpDSU9zR0pUYmpPcUU 2017 Microsoft MB2-713 exam dumps (All 100 Q&As) from Lead2pass: http://www.lead2pass.com/mb2-713.html [100% Exam Pass Guaranteed]