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CRM 3.0 Customization

MB2-422

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QUESTION: 1
The organization has requested a modification to the account entity. The organization wants a field called "Standard Industrial Classification Code." For advanced find or grid views the column label should read 'SIC Code.'

What is the best process to implement this modification?

A. On the Account form modify the label to read "SIC Code"; from the account attribute named "sic" modify the Schema Name to read "Standard Industrial Classification Code".

B. This is not supported; the label must be identical in both places

C. On the Account form, modify the label to "Standard Industrial Classification Code" and on the account 'sic' attribute modify the Display Name to read "SIC Code".

D. When picking columns to display in a view, rename the "Standard Industrial Classification Code" column to read "SIC Code".

Answer: C

QUESTION: 2
You are the implementation consultant for an organization implementing Microsoft CRM 3.0. You have created several custom attributes for the Contact entity and exposed them on the Contact form. A user reports that he cannot locate the custom attributes when creating a Microsoft?Word merge to send mail from the Outlook client.

What are three ways you can address this situation? (Select all that apply)

A. Try to reproduce the issue to determine if the user has made a mistake. If you can reproduce the behavior, open a support case with Microsoft CRM Technical support.

B. Export the data to Excel and create a Word mail merge document with the Excel file as the source

C. Recommend that they do not use Mail merge. Instead, recommend they create a personal Microsoft CRM e-mail template using the custom attributes and send the e-mail using this template.

D. Whenever possible, try to use existing system attributes to store data before creating custom attributes.

Answer: B, C, D

QUESTION: 3
Your organization has rules about how Opportunities are assigned when the Potential Customer is assigned to a different owner. If the Potential Customer is an Account, all the opportunities owned by the previous owner of the account are reassigned to the new owner of the account.

What is the best approach to address this requirement?

A. Develop a .NET assembly to enforce the rule and initiate it in a workflow rule or post-callout because the relationship behavior between Account and Opportunity is set to "system" and cannot be changed.

B. Locate the Account to Opportunity Relationship where the type of behavior is "System" . Set the Type of Behavior from System to Configurable Cascading. Then set the cascading option for the Assign action to 'Cascade User-Owned'. Set the Type of Behavior from System to Configurable Cascading. Then set the cascading option for the Assign action to 'Cascade User-Owned'.

C. Locate the Account to Opportunity Relationship where the type of behavior is 'Parental' . Set the Type of Behavior from Parental to Configurable Cascading. Then set the cascading option for the Assign action to 'Cascade User-Owned'

D. Locate the Account to Opportunity Relationship where the type of behavior is 'Parental' . Set the Type of Behavior from Parental to Referential. Then set the cascading option for the Assign action to 'Cascade User-Owned'

Answer: C

QUESTION: 4
You are implementing Microsoft CRM at an organization that wants to use an image file as an icon for a custom entity.

How do you do this?

A. Use the Microsoft CRM Customization Area to upload an icon for the Web and Outlook Clients.

B. Use the Microsoft CRM Customization area to upload an icon for the Web client. Copy the image file to the Outlook client network installation location so that it is installed when users install the Outlook client.

C. For the Web client, locate the default custom entity icon in <install path>_img\. The file uses the naming convention 'ico_<object type code>_1.gif. Replace this file with the image file. For the Outlook client, place the image file on a network share and create a .bat file that executes commands to perform the same action on user's local machines. Send the .bat file to users.

D. Use Microsoft CRM Deployment manager. Drag and drop the image file to replace the default icon. Restart IIS to refresh the Web Application. Outlook client users automatically download the new icon the next time they connect to Microsoft CRM.

Answer: A

QUESTION: 5
You are working with the system administrator at an organization. The organization has a custom entity with a large number of records. This custom entity is not configured to be available offline. Some users have requested that the information in this entity be made available offline.The system administrator is concerned that making this data available for offline users will impact all offline users synchronization performance.

What should you recommend to the system administrator?

A. To do this the System administrator must export all the data in the custom entity and re-create the custom entity. This time choose "Show in Microsoft CRM client for Outlook when offline". Then import the data back into Microsoft CRM.

B. The System Administrator should select 'Show in Microsoft CRM client for Outlook when offline'. Users desiring this data can create filters for synchronization. Other offline users are not affected.

C. The System Administrator is correct to be concerned with the impact this will have on the synchronization time for all users. Unless there is a strong business reason to allow this data to be available offline, do not change.

D. The System Administrator is correct to be concerned with the impact this will have on the synchronization time for all users. Before making this data available offline, all offline users should be advised to make adjustments to their offline filters so their synchronization performance does not suffer.

Answer: B

QUESTION: 6
Which reporting technologies can you use to access data stored in Microsoft CRM? (Select all that apply)

A. Microsoft Excel
B. Crystal Reports
C. SQL Reporting Services
D. Microsoft Word

Answer: A, B, C, D

QUESTION: 7
You are the implementation consultant for an organization implementing Microsoft CRM 3.0. You have created several custom attributes for the Contact entity and exposed them on the Contact form. A user reports that he cannot locate the custom attributes when creating a Microsoft Word merge to send mail from the Outlook client.

What are three ways you can address this situation?

A. Try to reproduce the issue to determine if the user has made a mistake. If you can reproduce the behavior, open a support case with Microsoft CRM Technical support.

B. Export the data to Excel and create a Word mail merge document with the Excel file as the source

C. Recommend that they do not use Mail merge. Instead, recommend they create a personal Microsoft CRM e-mail template using the custom attributes and send the e-mail using this template.

D. Whenever possible, try to use existing system attributes to store data before creating custom attributes.

Answer: B, C, D

QUESTION: 8
The organization provides social services and uses Microsoft CRM 3.0 to track interactions between social workers and families. During implementation the Contact entity has been re-named 'Adult' You have created a custom entity called 'Dependant' to store data about children cared for by an Adult. You must create a relationship that makes the Adult the primary entity in the relationship.

There are two ways to create the relationship between the Dependant and Adult (Contact) entity. Choose the correct methods:

A. From the Dependant entity click 'New Many-to-1 Relationship'
B. From the Adult entity, click 'New Many-to-1 Relationship'
C. From the Dependant entity click 'New 1-to-Many Relationship'
D. From the Adult entity click 'New 1-to-Many Relationship'

Answer: A, D

QUESTION: 9
The organization wants to define a second user in the case form to serve as a secondary owner. Contact information for the second user must be readily available in Workflow without requiring custom development.

A. Create a relationship between Case and User where user is the primary entity. Display the Relationship attribute in the Case form to allow the user to look up a valid user.

B. Create a text field in the case form to allow manual entry of a secondary user

C. Train users to create a Note on the Case to document the backup owner.

D. Create an organization-owned entity called 'Secondary Owner' that stores information representing Microsoft CRM users assigned as Secondary Case mowners. Create a relationship between Secondary Owner and Case to create a lookup field on the Case form. Maintain data about Secondary Owners separate from Users.

Answer: D

QUESTION: 10
You need client-side code that only functions when the user is not using the Quick Create form.

What is the best way for your code to determine whether the user is using the Quick Create form?

A. Programmatically count the number of items in the CrmForm. If the number of fields is less than the number of fields configured to display on the regular form, the user must be using the Quick Create form.

B. Programmatically check the RequiredLevel property for each field in the form. If all the fields are either Business Recommended or Business Required, the user must be using the Quick Create form.

C. Put the logic of the function inside a 'try.. catch'statement. If the error returned corresponds with the error found when the function is called in the Quick Create form, you can conclude that the user is in the Quick Create form.

D. Programmatically read the CrmForm.FormType property. If the value is '5' the user is using the Quick Create form.

Answer: D

QUESTION: 11
You are a System Administrator at an organization that has implemented Microsoft Dynamics CRM 3.0. The implementation has a number of customizations already applied including form customizations, client side code, custom relationship behaviors and custom mappings. You are beginning a new project to add additional customizations to Microsoft CRM. A development system with Microsoft CRM installed is available to develop customizations.

How should you proceed?

A. - Develop customizations on the development system.
- Test the customizations on the development system.
- Import the customizations to the production system.

B. - Develop customizations on the development system.
- Test the customizations on the development system.
- Document the customizations that were developed.
- Manually apply the customizations on the production system.

C. - Export the current customizations from the production system.
- Import the customizations to the development system.
- Develop and test the customizations on the development system.
- Export the customizations from the development system.
- Import customizations to the production system.

D. - Export customizations for the entities you plan to customize from the production system.
- Import the customizations to the development system.
- Develop and test the customizations on the development system.
- Export all customizations from the development system.
- Import all customizations to the production system.
- Publish only those entities you originally exported from the production system.

Answer: C

QUESTION: 12
You are the implementation consultant for an organization implementing Microsoft CRM 3.0. You have created several custom attributes for the Contact entity and exposed them on the Contact form. A user reports that he cannot locate the custom attributes when creating a Microsoft?Word merge to send mail from the Outlook client.

What are three ways you can address this situation? (Select THREE)

A. Try to reproduce the issue to determine if the user has made a mistake. If you can reproduce the behavior, open a support case with Microsoft CRM Technical support.

B. Export the data to Excel and create a Word mail merge document with the Excel file as the source
C. Recommend that they do not use Mail merge. Instead, recommend they create a personal Microsoft CRM e-mail template using the custom attributes and send the e-mail using this template.

D. Whenever possible, try to use existing system attributes to store data before creating custom attributes.

Answer: B, C, D

QUESTION: 13
You are implementing Microsoft CRM at a technical training institute. They want to manage courses and student enrollment with Microsoft CRM. There are custom entities for Course and Enrollment. The number of students in a course should be visible in the course view.

Which is the best approach?

A. Create a view based on the entities Course and Enrollment. Use the aggregate count function to determine the number of students in the course.

B. Create appropriate code in the OnLoad Event of the course form to calculate the number of students and store this in a custom attribute of the course.

C. Create a workflow rule for the Enrollment entity that updates a custom attribute of the course with the number of students each time a new student is enrolled.

D. Create an assembly that calculates the number of students and updates an attribute in the Course entity. Configure a Post Callout on the Enrollment entity to call this assembly.

Answer: D