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**QUESTION: 1**

You need to retrieve data for a report on the Account entity. The data must only display the Accounts a user has privileges to view.

What is the easiest method to access this data for the report?

- A. Create a Transact SQL query that uses the AccountBase table in the \_MSCRM database.
- B. Link the report to a .NET assembly that connects to Microsoft CRM Web Services and uses the Account.RetrieveMultiple() method with an appropriate query expression.
- C. Create a Transact SQL query that uses the FilteredAccount view in the \_MSCRM database.
- D. Create a Transact SQL query that uses the Account view in the \_MSCRM database.

**Answer: C**

**QUESTION: 2**

You want to perform conditional validation of field values. The appropriate value of a text field depends on the values in several other fields.

Which is the best event to perform this validation?

- A. Field OnChange Event
- B. Form OnSave Event
- C. Form OnChange Event
- D. Form OnLoad Event

**Answer: B**

**QUESTION: 3**

You want a specific report be available in the entity list view and from the Entity form.

How can you achieve this? Choose the best answer.

- A. Upload the report with the Report Designer with the appropriate project settings.
- B. Upload the report with the Report Manager and set the appropriate area settings.
- C. Use the PublishReports.exe command to publish the report to Microsoft CRM.
- D. Upload the report from the Microsoft CRM Reports area and set the appropriate Display in settings.

**Answer: D**

**QUESTION: 4**

You have entered code for an event in Microsoft CRM, but after saving and publishing the entity, the code does not seem to be working; the expected behaviour does not occur.

What can you do to troubleshoot this problem? (Select three)

- A. Confirm that you have enabled the event on the form or field.
- B. Check the HTML code for the form by right-clicking on the form and selecting 'View Source'.
- C. Use the alert() function in your code to confirm that the code is executing or to check dependent values.
- D. Test the behavior of the event in Preview mode.

**Answer:** A, C, D

**QUESTION: 5**

Your organization wants to manage Bank Account information for Accounts.. You created a custom entity called "Bank Account". The Account entity is the Primary entity in a relationship with Bank Account. The owner of an account and the owner of a Bank Account do not need to be the same. If an account is reassigned the Bank Account related to this account is not reassigned.

Which of the following Relationship behaviors meet this requirement? (Select three)

- A. Set the Relationship Behavior to "Parental".
- B. Set the Relationship Behavior to "Referential".
- C. Set the Relationship Behavior to "Referential, Restrict Delete".
- D. Set the Relationship Behavior to "Configurable Cascading" and set the behavior for the Assign action to "Cascade None".

**Answer:** B, C, D

**QUESTION: 6**

You are the implementation consultant for an organization implementing Microsoft CRM 3.0.

The organization sells products through sales representatives in geographic territories. Competition between salespeople for the best leads is intense. Leads without a clear geographic location are sometimes disputed.

Salespeople are assigned leads based on the lead's address. Leads may be imported from a marketing list, manually entered by Microsoft CRM users, or entered through an external website integrated with Microsoft CRM.

In all cases, address information is required and validated before the new lead record is created.

Which of the following represents the best method to assign leads to the correct salesperson?

- A. Use a SQL Server trigger on the Leads table of the Microsoft CRM database that executes a stored procedure to apply the appropriate logic and assign the Lead.
- B. Use a Workflow rule on the create event of the Lead entity to apply the appropriate logic and assign the lead.
- C. Use Client-side code in the Microsoft CRM web application to apply the appropriate logic and assign the lead.

D. Train salespeople to create a personal view that displays unassigned leads that meet the criteria for their territory. Salespeople can refer to this view and assign leads to themselves using the bulk edit capability in Microsoft CRM.

**Answer:** B

**QUESTION: 7**

The Sales Manager needs a report to monitor open opportunities with a Microsoft Excel pivot table.

What are the best two approaches to achieve this?

A. Create a pivot table in a static Microsoft Excel worksheet and upload it with the SQL Server Reporting Services Report Manager.

B. Create a dynamic Microsoft Excel pivot table and upload it with the SQL Server Reporting Services Report Designer.

C. Create a dynamic Microsoft Excel pivot table and upload it with the Microsoft CRM Reports Area.

D. Create a dynamic Microsoft Excel pivot table and save it on the desktop of the Sales Manager.

**Answer:** C, D

**QUESTION: 8**

The organization uses the account classification field to drive an important business process enforced in Workflow. All Accounts must be classified. Users may need to create an Account before they know the appropriate Account classification.

Which is the best process to ensure that Accounts are accurately classified so the business process is implemented correctly?

A. Set the Account Classification Requirement Level to "Business Required." Users must specify a classification before they can create an Account and an Opportunity.

B. Set the Account Classification Requirement Level to "Business Required". Provide an option in the picklist for "Unknown". Configure workflow to wait until the classification field is changed to a value other than "Unknown" before proceeding with the business process. Configure Workflow to create a task for the owner of the Account to determine the classification within a fixed period of time.

C. Set the Account Classification attribute Requirement Level to "No Constraint". Configure workflow with logic to apply an alternate business process when no data is provided for Account Classification. Configure workflow to set the Account classification value to "unknown" when no value is provided.

D. Periodically execute a query to check for Accounts without a Classification value selected. Deactivate all accounts that are found without a Classification value.

**Answer:** B

**QUESTION: 9**

When mapping entity attributes, which of the following restrictions apply? (Select three)

- A. Both attributes must be of the same data type.
- B. The length of the target attribute must be equal to or greater than the length of the source attribute.
- C. The target attribute cannot be involved in any other mapping in the same relationship.
- D. Both attributes must be system attributes.

**Answer:** A, B, C

**QUESTION: 10**

The organization wants to change the name of the Opportunity entity to "Deals".

Which of the following best describes the process?

- A. - Change the display name of the entity and publish the entity.  
- All effected areas are updated through platform metadata.
- B. - Change the display name of the entity.  
- Edit any attribute display names that reference the term "opportunity".  
- Publish entity customizations.
- C. - Change the display name of the entity.  
- Edit attribute display names that reference the term "opportunity."  
- Manually modify Entity Forms and views that reference the term "opportunity."  
- Publish entity customizations.
- D. - Change the display name of the entity.  
- Edit any attribute display names that reference the term "opportunity."  
- Manually modify the Entity Forms and views that reference the term "opportunity."  
- Modify system messages that reference the term "opportunity."  
- Publish entity customizations.  
- Modify online help content that uses the term 'opportunity. '  
- Modify reports that use the term 'opportunity.'

**Answer:** D

**QUESTION: 11**

The organization wants users to be able to locate a specific account based solely on the Account main phone number.

What is the best way to achieve this?

- A. Add the main phone attribute as a View column to the Active Accounts view. Train users to sort results on the main phone column and use page controls on the view to locate the record.
- B. Create a new system view called 'Main Phone View' that includes the main phone attribute as the first column. Train users to type the phone number in the 'Look for:' textbox and click Find while using the 'Main

Phone View'

C. In the Main Phone attribute, select the 'Add attribute to Quick find criteria' check box. Train users to type the phone number in the 'Look for' text box and click Find.

D. Add the Main Phone attribute as a 'find Column' in the Quick Find View for Accounts. Train users to type the phone number in the 'Look for' text box and click Find.

**Answer:** D

**QUESTION: 12**

The organization wants to create a custom entity called "Event" to store information about special events that are not part of the normal services they offer.

They want to include three lookup fields on the event form to associate Microsoft CRM users responsible for the areas of Entertainment, Catering, and Security.

Which of the following represent possible solutions to address this need? (Select three)

A. Create three relationships between Event and User where User is the primary entity. Display the lookup fields in the Event form.

B. Use a text field to enter the names of the individuals without using a lookup field.

C. Have a developer create a custom .aspx page that will allow users to select a CRM User and save this information with the Event record; however, no actual relationship is created in Microsoft CRM.

D. Create the Event entity with a relationship to Activities. Rather than store the information in the Event form, create Task activities for the respective areas of responsibility.

**Answer:** B, C, D

**QUESTION: 13**

Which of the following are valid events when defining a workflow rule?

A. Manual

B. Assign

C. Change Status

D. Update

**Answer:** A, B, C

**QUESTION: 14**

The organization sells and supports computer hardware for its customers. They want to use Microsoft CRM to track the computer equipment delivered to the customer. The organization created a Computer Entity with a relationship to an Account as the primary entity. The business requirement states that if the Account is deleted, the associated Computer Entity should not be deleted and must be associated to another account before the account can be deleted.

Select the correct Type of Behavior for this requirement.

- A. Parental
- B. Referential
- C. Referential, Restrict Delete
- D. Reciprocal

**Answer: C**

**QUESTION: 15**

A developer has applied client side code that manipulates the available options for a picklist in a custom entity. During testing, you discover that when some of the options are selected and the record is saved, the value of the picklist field always returns to the default value of the picklist.

What is the most likely cause of the problem?

- A. Code in the OnSave event is changing the value of the picklist.
- B. Manipulating the available options of picklist in client side code is not supported.
- C. Manipulating the available options of picklist in client side code is only supported in System entities.
- D. The developer has included an option with an invalid integer value for the picklist attribute.

**Answer: D**

**QUESTION: 16**

You are implementing Microsoft CRM at an organization that tracks sensitive financial information in specific accounts. The ability to view this information should be limited to a specific security role, yet the Account information must be visible to the entire company.

What is the best way to achieve this?

- A. Add appropriate custom attributes to store sensitive information in the account entity.  
Configure Security so that only a member of a specific security role can view these custom attributes.
- B. Add appropriate custom attributes to store sensitive information in the account entity and use client-side code to display these fields only to members of a specific security role.
- C. Create a custom entity to store sensitive information with a related relationship to the Account.  
Configure security on the custom entity so that only a member of a specific security role has view privileges.
- D. Create a custom entity with a related relationship to the Account.  
Configure security on the custom entity so that only the owner of the record has view privileges.

**Answer: C**

**QUESTION: 17**

You are the implementation consultant for an organization implementing Microsoft CRM 3.0.

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The organization sells to accounts that have many geographic locations but centralized purchasing. For example, the account may be the holder of a number of restaurant franchises.

The organization wants to track each of the geographic locations where the customer has a presence for the purpose of making deliveries.

They also want to track the manager of each location and store notes about the location.

However, all sales and service interactions, including e-mail are performed with the accounts centralized purchasing department.

What is the best way to implement this business model in Microsoft CRM?

A. - Create a custom entity called "Customer Site".

- Associate the Customer Site entity with Notes.
- Create attributes to store address information.
- Create a relationship with account as the primary entity.
- Create a referential relationship with Contact to store the Manager for the Customer Site and expose this lookup field on the Customer Site form.

B. - Create Account records for each of the Account geographic locations.

- Link each account as a sub-account to the main account location.
- Use the Account Primary Contact field to store information about the manager.
- Use Notes to capture information about each location.

C. -- Create separate Address Records for each location.

- Use the Address Contact text field to store information about the Manager.
- Add a Memo attribute to store notes about the location and add it to the address form.

D. - Create a custom tab on the Account form.

- Create a series of Sections called Location 1, Location 2, Location 3, and so on.
- Create attributes to store address information, information about the location manager, and notes about each location.
- Add these attributes as fields in their respective sections.

**Answer: A**

### **QUESTION: 18**

In your organization sometimes lengthy or complex sales cycles occur. Your Sales Manager wants standardized procedures for such sales cycles. When the probability of an opportunity is changed, specific activities should be automatically created.

What is the easiest way to achieve this?

A. Create a Workflow Rule that reacts on the change of the probability of an opportunity. Create rule-appropriate activities in the workflow.

B. Create an OnChange event in the Opportunity with appropriate JScript code.

C. Define a Sales Process with Sales Stages.

D. Have a developer create a Post Callout component.

**Answer: C**

**QUESTION: 19**

You have a relationship between Account and a custom entity where the custom entity is the primary entity. A lookup field on the Account form allows the account to be associated with the custom entity.

What steps must be performed to delete the relationship between these entities?

A. From the Account entity, delete the relationship.

The lookup field is automatically be removed from the Account entity form.

B. Remove the lookup field from the account entity form and delete the relationship.

C. Remove the lookup field from the Account entity form, publish the Account entity, and delete the relationship attribute from the Custom entity.

D. Remove the lookup field from the Account entity form, publish the Account entity, and delete the relationship.

**Answer: D**

**QUESTION: 20**

The organization has several Web based reports using other data sources they want to make available from Microsoft CRM. The organization wants all reports to be available from one location.

Which of the following represents the best solution?

A. - Convert the reports to SQL Reporting Services Reports.

- Upload the Reports through the Microsoft CRM Reports area.

B. - Create new reports in Microsoft CRM.

- Select Report Type = 'Link to Web Page'.

- Enter the URL for the report in the Location field.

C. - Create new reports in Microsoft CRM.

- Select Report Type = 'File'.

- Enter the location of the file that renders the web based report.

D. - Create a new area called eports?in the application navigation pane.

- Configure this area to open a page that allows users to launch the web-based reports they want to view.

**Answer: B**