



**Vendor:** Microsoft

**Exam Code:** MB2-631

**Exam Name:** Microsoft Dynamics CRM 4.0 Customization  
and Configuration

**Version:** DEMO

### QUESTION 1

You are a Microsoft CRM Consultant and have been asked to advise a company on their Business Unit structure. When the company installed Microsoft Dynamics CRM 4.0 they named the root Business Unit adventure Work Cycle missing the from works The company has asked you how they can change this.

What action do you take?

- A. Edit the Business Unit name and correct the spelling, save and publish to all users.
- B. Disable the Business Unit and create a new one with the correct spelling.
- C. Uninstall and re-install Microsoft Dynamics CRM 4.0 using the correct spelling.
- D. Create a new Business Unit with the correct spelling, assign it to the original root and then disable the original root.

**Answer: C**

### QUESTION 2

You are the implementation consultant at Fabrikam Inc. Fabrikam initially bought 20 user licenses for Microsoft Dynamics CRM Dynamics 4.0, which are all in use.

What will happen if you attempt to add a new user to Microsoft Dynamics CRM?

- A. You will not be permitted to add a new user account
- B. The new user account will be created, and the Restricted Access Mode option will be automatically set on the account.
- C. The new user account will be created, and it will be assigned the user license from another active user.
- D. The new user account will be created, but it will be disabled.

**Answer: D**

### QUESTION 3

A number of users from the sales and service Business Units need identical access to several Contracts. The sales and service Business Units are both direct children of the root Business Unit. You do not want to impact any of the users permissions on other entities.

What is the most effective way to achieve this?

- A. Create one team and add the selected users from both business units to the team. Share the Contracts with this team.
- B. Create two teams; one for each child Business Unit. Add the selected users to the appropriate team in their Business Unit. Assign the Contracts to one team, and share the Contracts with the other team.
- C. Create a new Business Unit and add the selected users to this new Business Unit. Assign the contracts to a user within the new parent Business Unit.
- D. Create two teams; one for each child Business Unit. Add the selected users to the appropriate team in their Business Unit. Create another team in the root Business Unit, and add the two teams in the child Business Units to the team in the root Business Unit. Share the Contracts with the team in the root Business Unit.

**Answer: A**

### QUESTION 4

You are the IT administrator for your organization, which translates written material into multiple languages. Your staff use the web client, and want to use CRM in their own languages, and all available language packs have been installed on the CRM server.

You want the Translations Manager to be able to choose which languages are available to the users.

What steps should you take? Choose the 2 that apply.

- A. Give the Translations Manager a security role that has Organizational access level to 'Language settings'.
- B. Tell the Translations Manager how to enable and disable language packs.
- C. Install all language packs on all client computers.
- D. Give the Translations Manager a security role that has Organizational access level for the Assign privilege on the Language entity.

**Answer:** AB

#### **QUESTION 5**

You are responsible for managing users within your company's Microsoft Dynamics CRM 4.0 implementation. The implementation contains Business Units, a Western Region and an Eastern Region both of which have the same parent Business Unit, a Sales & Marketing One user has left the Eastern Region and now works for the Western Region.

He needs the equivalent access to records in the Western Region that he formerly had in the Eastern Region. The user is a member of the sales Team Leader security role, which was created in the Sales & Marketing Business Unit.

How should you do this?

- A. Remove the user from the Sales Team Leader role in the Eastern Region.  
Add the user to the Sales Team Leader role in the Western Region.
- B. Change the user Business Unit to Western Region.  
Remove the user from the Sales Team Leader role in the Eastern Region.  
Add the user to the Sales Team Leader role in the Western Region.
- C. Change the user Business Unit to Western Region.  
Copy the Sales Team Leader role from the Eastern Region to the Western Region.  
Add the user to this newly copied role.
- D. Change the user Business Unit to Western Region.  
Add the user to the Sales Team Leader role in the Western Region.

**Answer:** D

#### **QUESTION 6**

You have been asked to add 200 users to Microsoft Dynamics CRM 4.0. Each user has an Active Directory account, and all accounts are in the same Active Directory domain. Each user should be added to one of the three Business Units defined within CRM, and one of the four Security roles that are in use within CRM. Some users should have the Full license, and others the Read Only license.

What is the quickest way to add the users to CRM?

- A. Add each user individually within CRM.  
Set the appropriate Security role, Business Unit and CRM license when adding each user.
- B. Use the Add Users Wizard to add users.  
Run the Add Users Wizard once for each combination of Security Role, Business Unit and CRM license.

- C. Use the Add Users Wizard to add all the users to CRM.  
Once the users have been added, select appropriate groups of users to change the Security Role, Business Unit and CRM license.
- D. Use the Add Users Wizard to add users.  
Run the Add Users Wizard once for each combination of Security Role and Business Unit.  
Once the users have been added, select multiple users to the assign them the appropriate CRM license.

**Answer: B**

#### **QUESTION 7**

Several currencies are in use in Microsoft Dynamics CRM 4.0, and the base currency is US Dollars.

You update the exchange rates daily using an imported CSV file.

Which of the following actions will cause the new exchange rates to be used on an Opportunity record? Choose the 2 that apply.

- A. Updating a non-financial field on an Opportunity record.
- B. Changing the status of an Opportunity record.
- C. Assigning an Opportunity record to a different user.
- D. Updating a financial field on an Opportunity record.

**Answer: BD**

#### **QUESTION 8**

Several colleagues have been amending Organizational Settings.

At 10.00, Sylveste set the suffix length for Cases to 5.

At 10.30, Paul set the prefix for Cases to INC.

At 11.00, Chris set the prefix for Tracking Tokens to TTS. At 11.30, David set the suffix length for Contracts to 6.

After these changes, which of the following is a valid format for a Case number?

- A. INC-1234-J1BZJ7
- B. INC-1234-J1BZJ
- C. TTS-1234-J1BZJ7
- D. TTS-1234-J1BZJ

**Answer: A**

#### **QUESTION 9**

You are the administrator of a Microsoft Dynamics CRM 4.0 implementation, in which Contacts are displayed in the format lastname, firstname.

You have been asked to change this to firstname lastname.

You change this format in the System Settings General tab.

What effect will this have on the existing Contact records?

- A. All Contact records will be updated to display the new format.

- B. All Contact records will remain unchanged until the Contact entity is published. Once the entity has been published, all Contact views will display the new format.
- C. All Contact records will be updated to display the new format, but Outlook users must close and re-open Outlook to see the change.
- D. All existing Contact records will remain unchanged. New Contact records will display the new format.

**Answer: D**

#### **QUESTION 10**

Which combination of Microsoft Dynamics CRM security privileges allows a user to attach a Note to an Account? Select the best answer.

- A. Read privilege on the Note. Write privilege on the Account.
- B. Share privilege on the Note. Write privilege on the Account.
- C. Append privilege on the Note. Append To privilege on the Account.
- D. Append To privilege on the Note. Append privilege on the Account.

**Answer: C**

#### **QUESTION 11**

You have been asked to set the access level for sales users to a custom entity called Project that is user owned. The requirement is for the sales users to be able to view Projects within their business unit and only create new Projects for themselves.

You copy the Salesperson role and make a change to it ready to assign to sales users. What security settings should be set on the Project entity?

- A. Read privilege with access level set to Parent: Child Business Unit. Create privilege with access level set to User.
- B. Read privilege with access level set to Business Unit. Create privilege with access level set to User.
- C. Read privilege with access level set to User. Create privilege with access level set to Business Unit.
- D. Read privilege with access level set to Organization. Create privilege with access level set to User.

**Answer: B**

#### **QUESTION 12**

You are an administrator for a company which has approximately 1000 CRM users. You employ four groups of contract staff, who work for different parts of your business. Each group consists of ten users who need access to the CRM system for one week each month. The users should not be allowed access the rest of the month.

How can you do this in the most efficient way?

- A. Create a new child Business Unit for each group of contract staff, and add the appropriate group of ten users to each Business Unit. Enable the appropriate Business Unit when the users need access, and disable the Business Unit when you want to prevent access.
- B. Create a new child Business Unit for each group of contract staff, and add the appropriate group of ten users to each Business Unit.

- Remove the users from their Business Unit when you want to prevent access.
- C. Add all the users to CRM. Enable each user when you want to allow access, and disable each user when you want to prevent access.
  - D. Create a Business Unit and add all the users to it. When the users are finished delete the Business Unit. Recreate the Business Unit when the users need access again.

**Answer: A**

**QUESTION 13**

Your Microsoft Dynamics CRM 4.0 organization has been set up with a default currency of United Kingdom Pounds (GBP). In your personal preferences you have specified a default currency of Euros (EUR). One of the Accounts in CRM, abrikam Inc. has a currency of US Dollars (USD). From the Sales area you select ew Quote and then add Fabrikam Inc. as the potential customer. What currency will be set on the new Quote?

- A. USD
- B. GBP
- C. EURO
- D. No currency will be set by default

**Answer: C**

**QUESTION 14**

You work for a company where Microsoft Dynamics CRM 4.0 has been installed and customized with the English language. In addition, you have installed the Spanish language pack on the server.

You have installed and enabled the Spanish language option in your Microsoft Dynamics CRM 4.0 Client for Office Outlook with offline access.

When you open the Microsoft Dynamics CRM 4.0 Client for Office Outlook with offline access, what areas of the application are affected?

Choose the 2 that apply.

- A. Standard Microsoft Office Outlook Menu Options.
- B. Microsoft Office Outlook Folders specific to Microsoft Dynamics CRM.
- C. Custom picklists.
- D. Offline Synchronization user interface.

**Answer: BD**

**QUESTION 15**

What is the maximum number of tabs allowed on a Form in Microsoft Dynamics CRM 4.0?

- A. 7
- B. 9
- C. 8
- D. The number of tabs is unlimited.

**Answer: C**



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