Exam Code: MB-230
Exam Name: Microsoft Dynamics 365 for Customer Service

Case 01 - Manage cases and Knowledge Management

Case Study

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Background

Humongous Insurance is contracted to process all insurance claims for a health facility that accepts the following types of health insurance:

Health maintenance organization (HMO)

Preferred-provider organization (PPO)

Gold

Cases are classified as new claims, claim disputes, and follow-ups. Each insured person is entitled to open 25 new cases each calendar year.

Support representatives specialize by and process claims by insurance type.

Humongous Insurance currently accepts claims only by telephone. The call center is open from 06:00 GMT to 24:00 GMT daily. Call center staff work one of the following shifts: 06:00 GMT to 12:00 GMT, 12:00 GMT to 18:00 GMT, and 18:00 GMT to 24:00 GMT.

When a case is received by email, a staff member categorizes the case as email and closes the case immediately.

Current environment

Humongous Insurance has three departments to handle claim types: HMO, PPO, and Gold.

The company uses handwritten forms to send claims information to the correct department.

Each department maintains a workbook to record calls received.

Requirements. Support desk

Configure the system to track the number of insurance claims filed each year.

Categorize claims by type as they are opened.

Configure the system to track staff responsiveness to service-level agreements (SLAs).

Ensure that business hours reflect the hours that support staff are scheduled.

Requirements. Case handling

All new cases must be automatically placed into a queue based on insurance type after the type is selected.

All insurance types need to be automatically moved to the proper queue when the subject is picked.

All cases must be created and closed immediately when received.

The status reason must be set to Email Sent or Phone Call.

Information must be restricted by insurance and phone call type.

Managers must be alerted when customers reach their limit of 25 cases for the year.

Changes to cases must not be counted against entitlements until the case is closed.

Requirements. Disputes

Claim disputes must be categorized as low priority.

The status for all disputed cases must be set to Review by a Manager before a disputed case may be closed.

Requirements. Knowledge base

A knowledge base must be used as a repository for all answers.

Representatives must be able to search the knowledge base when opening a new case for similar claims.

Representatives must be able to search across all entities at all times.

Searches must check any field in the entity for matches in a single search.

Searches must return results in a single list and sort the list so that the most relevant results appear at the top of the list.

Representatives must be able to link the knowledge base to cases when applicable.

Representatives must create a new knowledge base article if an answer is not found in the existing knowledge base.

Representatives must be able to use SQL-like syntax to search the knowledge base.

Requirements. Service-level agreements

When a customer calls to open a claim, the company must respond to the caller within the following time frames:

Plan	Response time
HMO	24 hours
PPO	6 business hours
Gold	1 business hour

Requirements. Alerts

Cases must be flagged when they are past the SLA threshold.

An email alert must be sent to the manager to indicate an SLA noncompliance.

An email alert must be sent to representatives for SLA violations as follows: HMO 2 hours prior and PPO 1 hour prior.

Send an email alert to support managers when disputes are ready to be closed.

Send an email alert to customers when cases are closed.

Requirements. Issues

The current process is all manual and not efficient.

There is no easy way to determine whether the company is meeting its SLAs.

Representatives are often inconsistent regarding how they handle customers and answer customer questions.

There is no accountability for any of the representatives who take calls.

QUESTION 1
DRAG DROP
You need to configure the system to store answers about claims.

Which four actions should you perform in sequence? To answer, move all actions from the list to the answer area and arrange them in the correct order.

Select and Place:

Actions

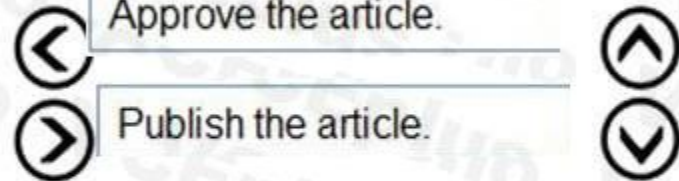| Actions |
|---|
| Enable search. |
| Set routing. |
| Export to case resolution. |
| Publish the article. |
| Create an article. |
| Mark for review. |
| Approve the article. |

Answer Area

Correct Answer:

Actions

Actions
Enable search.
Set routing.
Export to case resolution.

Answer Area

Answer Area
Create an article.
Mark for review.
Approve the article.
Publish the article.

Section:
Explanation:

Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-service/customer-service-hub-user-guide-knowledge-article

QUESTION 2
A customer has three cases in process and two cases for the current calendar year.
You need to determine how many cases the customer has left on their entitlement.
How many cases are left?

A. 20
B. 22
C. 23
D. 25

Correct Answer: C
Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-service/create-entitlement-definesupport-termscustomer

QUESTION 3
You need to create the SLAs.
Which three SLAs should you create? Each correct answer presents part of the solution.
NOTE: Each correct selection is worth one point.

A. SLA with 24 hours as the failure time and no warning
B. SLA with 6 hours as the failure time and a one-hour warning
C. SLA with 6 hours as the failure time and no warning
D. SLA with one hour as the failure time and no warning
E. SLA with 24 hours as the failure time and a two-hour warning

Correct Answer: B, D, E
Section:
Explanation:

An email alert must be sent to representatives for SLA violations as follows: HMO 2 hours prior and PPO 1 hour prior.

QUESTION 4
DRAG DROP
You need to ensure that customers cannot open more cases than they are allowed.
Which four actions should you perform in sequence? To answer, move the appropriate actions from the list of actions to the answer area and arrange them in the correct order.

Select and Place:

Actions

Actions
Add the start date and end date.
Save the entitlement and then add the entitlement channel.
Add the entitlement channel as email with 25 as the total term.
Add the entitlement channel as phone with 25 as the total term.
Create new entitlement in Service Management.
Add entitlement channel before saving the new entitlement.
Create new service level agreement in Service Management.

Answer Area

Ⓒ Ⓓ   Ⓐ Ⓥ

Correct Answer:

Actions

Actions
Add the entitlement channel as email with 25 as the total term.
Add entitlement channel before saving the new entitlement.
Create new service level agreement in Service Management.

Answer Area

Answer Area
Create new entitlement in Service Management.
Add the start date and end date.
Save the entitlement and then add the entitlement channel.
Add the entitlement channel as phone with 25 as the total term.

Ⓒ Ⓓ   Ⓐ Ⓥ

Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-service/create-entitlement-define-support-terms-customer

QUESTION 5
HOTSPOT

You need to create and configure objects to support the requirements.

How should you configure the system? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

Answer Area

Setting	Value
Total number of queues	3 / 4 / 5 / 6
Number of automatic case creation rules	1 / 2 / 3 / 4
Number of routing rule sets	3 / 4 / 5 / 6

Answer Area:

Answer Area

Setting	Value
Total number of queues	**3** / 4 / 5 / 6
Number of automatic case creation rules	**1** / 2 / 3 / 4
Number of routing rule sets	**3** / 4 / 5 / 6

Section:
Explanation:

QUESTION 6
HOTSPOT
You need to configure the correct settings.
Which settings should you configure? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Hot Area:

Answer Area

Scenario	Setting
Process cases for an insurance type once a type is selected.	▼
	Case routing
	Automatically create and update records
	Create queues
Receive and process an email from a customer to open an insurance claim.	▼
	Case routing
	Automatically create and update records
	Create queues
Ensure cases phoned in can be separated and taken only by the applicable representative.	▼
	Case routing
	Automatically create and update records
	Create queues

Answer Area:

Answer Area

Scenario	Setting
Process cases for an insurance type once a type is selected.	▼
	Case routing
	Automatically create and update records
	Create queues
Receive and process an email from a customer to open an insurance claim.	▼
	Case routing
	Automatically create and update records
	Create queues
Ensure cases phoned in can be separated and taken only by the applicable representative.	▼
	Case routing
	Automatically create and update records
	Create queues

Section:
Explanation:

QUESTION 7
You need to configure the queue for telephone-based cases.
What are two possible ways to achieve this goal? Each correct answer presents a complete solution.
NOTE: Each correct selection is worth one point.

A. Create a case from email.
B. Define an SLA and entitlements and set entitlement values for case numbers.
C. Configure a status reason transition.
D. Create a case routing rule.
E. Automatically create or update records.

Correct Answer: B, C
Section:

QUESTION 8
You need to search for answers to customer claims.
Which type of search should you perform?

A. Timeline
B. Quick Find
C. Related
D. Detail
E. Case Relationships

Correct Answer: C
Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-service/search-knowledge-articlescsh#knowledgebasesearch-control

QUESTION 9
You need to ensure that claim disputes conform to the defined case life cycle.
What should you configure?

A. Related cases
B. Case Relationships
C. Timeline
D. Status Reason Transition
E. Subject

Correct Answer: D
Section:

Case 02 - Implement scheduling

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Background

Lamna Healthcare Company provides health care services to communities across the region. The company provides telehealth services only and does not offer in-person appointments. The company has staff that speak English and

Spanish.

The company is open from 8 AM to midnight Monday through Friday to provide services. Patients can make appointments by calling or using the internet. All appointments are conducted by phone or by using a computer.

Current environment. Services

Lamna provides two types of appointments: wellness and sick. A doctor and a nurse are scheduled for each sick appointment. A doctor or a nurse are scheduled for wellness appointments.

Current environment. Employees

General

Employees are located in the Pacific and Eastern time zones.

Case representatives

Case representatives handle incoming calls, provide information to patients for appointments, and schedule follow-up calls with doctors. Case representatives can also help with people who want to chat online.

All case representatives work eight-hour shifts. Case representatives typically focus on cases that involve one type of illness. The case representatives may back up others when call volumes are large.

Several case representatives speak both Spanish and English. The only company holidays the case representatives have off are New Year's Eve day and New Year's Day.

Customer satisfaction and escalation

Customer satisfaction representatives monitor all activity and ensure that there is a uniform process for all calls. Case managers schedule shifts and are a point of escalation.

Requirements. System and resources

Each employee must use the system.

Case managers must be users in the system but must not be available for the scheduling rotation or manually assigned.

Patients must be offered at least three alternative times to schedule an appointment.

Requirements. Cases

The system must support live chats, texting, and Twitter.

Case representatives must be able to chat, text, and tweet without exiting the system they use to track calls.

Case representatives must be able to chat live only with customers whose calls are routed or assigned to them.

Managers must be able to monitor all communication as well as add or delete quick replies.

Customer satisfaction representatives must be able to read agent scripts and workflows.

A live chat must pop up each time someone fills out the form to register for an appointment. The live chat must automatically be sent to the case representative who is best qualified to answer the question.

There are two type of queues: regular and escalated.

Tickets must be routed to the most qualified representative for the illness.

Tickets assigned to a representative must be automatically placed in that representative's queue.

Requirements. Chat escalation process

Each division must have one manager for escalations.

Patients who request an escalation from the website must automatically be routed to a chatbot. The patient will answer predefined questions and will be alerted that someone will call them back. Chat transcripts must be sent to the appropriate manager.

Only escalations must go to the chat bot.

You must create two types of Omnichannel queues: regular and escalated.

Only managers must be able to access the Omnichannel Insights dashboard.

Requirements. Managers

Managers must be able to review weekly productivity reports for representatives by using Omnichannel Insights dashboards.

Managers must be able to monitor patient moods during patients' conversations with representatives.

Managers must be able to determine whether a patient is feeling negative during a live chat with a representative.

Requirements. Appointments

Representatives must be able to schedule appointments and see everyone's free/busy time during their scheduled working hours.

Appointments must be scheduled by representatives in open time slots for nurses and doctors.

Nurses and doctors must be booked for 30-minute time slots.

Patients must be offered at least three alternative times to schedule an appointment.

Requirements. Analytics

You must implement Customer Insights to keep track of how well representatives are managing customers' requests.

Analytics must be viewable only in the production environment.

You must ensure that only escalation managers can create workspaces and control access to workspaces Case representatives must be rated on knowledge of their primary specialty and their backup specialty.

Case representatives must only be able to view workspaces.

Managers must be able to review dashboards in the Chat channel to ensure that case representatives are meeting their objectives.

QUESTION 1
HOTSPOT
You need to configure the options for the schedule.
Which options should you configure? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Hot Area:

Answer Area:

Answer Area

Setting	Option
Resource Type	User ▼
	User
	Account
	Contact
	Facility
Vice Presidents' schedule	▼
	Clear the Display on Schedule Board check box.
	Clear the Enable for Availability check box.
	Set the schedule to User is not working.
	Set the Service Restriction.

Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-service/resources-service-scheduling

QUESTION 2
HOTSPOT
You need to select the feature for each parameter.
Which feature should you use for each parameter? To answer, select the appropriate options in the answer area.
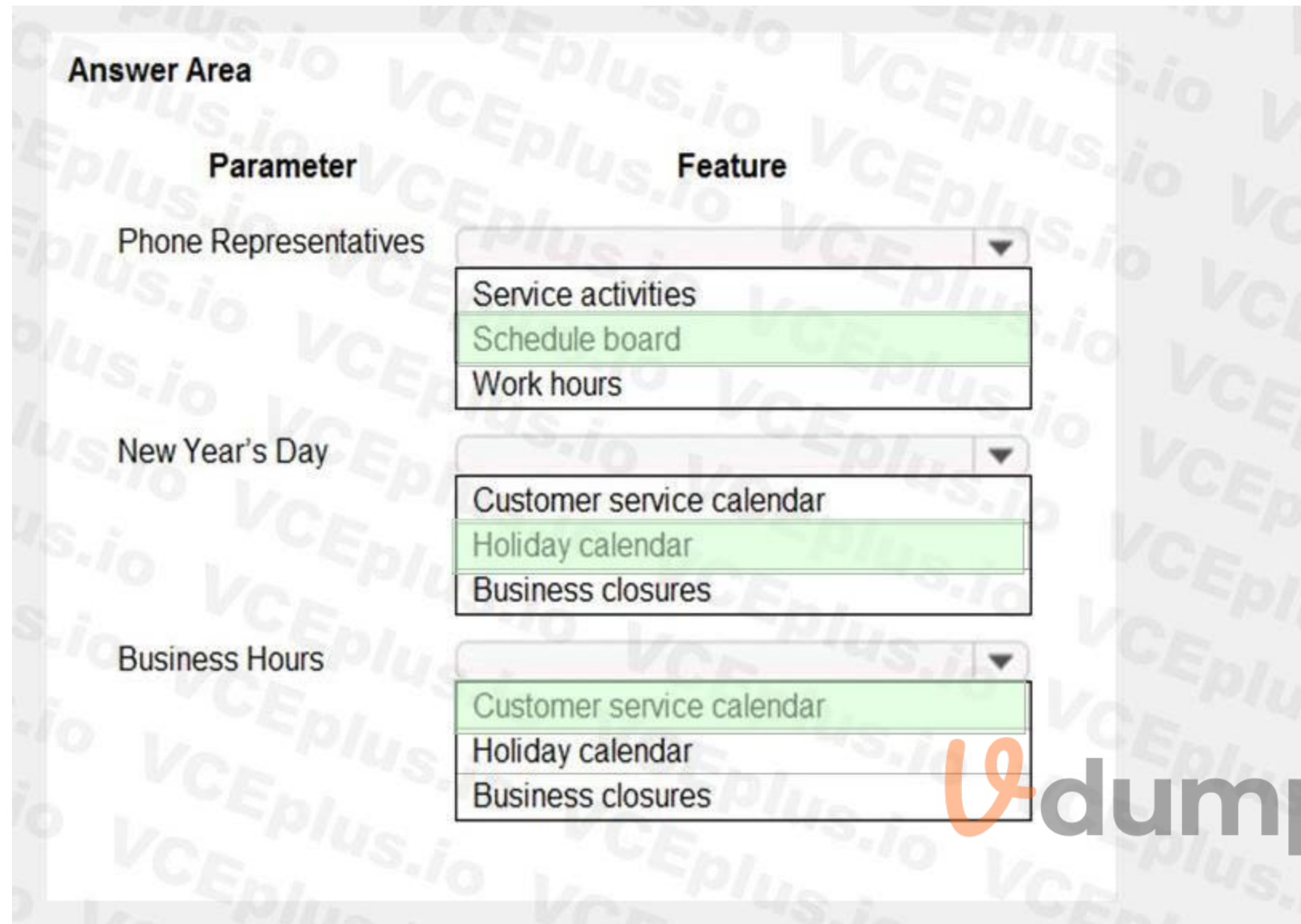NOTE: Each correct selection is worth one point.

Hot Area:

Answer Area

Parameter	Feature
Phone Representatives	▼
	Service activities
	Schedule board
	Work hours
New Year's Day	▼
	Customer service calendar
	Holiday calendar
	Business closures
Business Hours	▼
	Customer service calendar
	Holiday calendar
	Business closures

Answer Area:

Answer Area

Parameter	Feature
Phone Representatives	Service activities / **Schedule board** / Work hours
New Year's Day	Customer service calendar / **Holiday calendar** / Business closures
Business Hours	**Customer service calendar** / Holiday calendar / Business closures

Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-service/create-operating-hours

QUESTION 3
You need to configure the system to notify managers about unhappy patients.
What should you do?

A. Configure Omnichannel Insights.
B. Set a routing rule for escalations.
C. Change the value of the Monitor real-time customer sentiment option to Yes.

Correct Answer: C
Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-service/oc-monitor-real-time-customersentimentsessions

QUESTION 4

What should managers use to perform weekly reviews with case representatives?

A. Tier 1 dashboard
B. Agent Insights
C. Connected Customer Service dashboard
D. Customer Service Performance dashboard

Correct Answer: B
Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-service/intraday-agents-insights

QUESTION 5
HOTSPOT
You need to configure each escalation scenario.
Which configuration should you use for each scenario? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Hot Area:

Answer Area

Scenario	Configuration
Escalation workstreams	▼
	One routing rule that includes both escalations and regular tickets
	Two routing rules: one for escalations and one for regular tickets
	Code snippet to engage a bot
	Bot channel from the Microsoft Azure portal
Escalation handling tool	▼
	Power Virtual Agents
	Unified Service Desk
	Customer Service Insights
	Customer Insights

Answer Area:

Answer Area

Scenario	Configuration
Escalation workstreams	▼
	One routing rule that includes both escalations and regular tickets
	Two routing rules: one for escalations and one for regular tickets
	Code snippet to engage a bot
	Bot channel from the Microsoft Azure portal
Escalation handling tool	▼
	Power Virtual Agents
	Unified Service Desk
	Customer Service Insights
	Customer Insights

Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-service/configure-bot-virtual-agent

QUESTION 6
HOTSPOT
You need to configure OmniChannel to route correctly.
Which options should you use? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Hot Area:

Configuration	Option
Number of work streams	▼
	None
	One
	Two
	Three
Ticket placement on assignment	▼
	Select the Automatically move records in queue checkbox in the case entity in the solution
	Add a routing rule for a push on owner assignment in Omnichannel
	Ass a work stream for a push on owner assignment in Omnichannel
	Select the Enable for SLA checkbox in the case entity in the solution

Answer Area:

Configuration	Option
Number of work streams	[dropdown]

None
One
Two
Three

Ticket placement on assignment	[dropdown]

Select the Automatically move records in queue checkbox in the case entity in the solution
Add a routing rule for a push on owner assignment in Omnichannel
Ass a work stream for a push on owner assignment in Omnichannel
Select the Enable for SLA checkbox in the case entity in the solution

Section:
Explanation:
Box 1: Two
You must create two types of Omnichannel queues: regular and escalated.
Box 2: Add a routing rule for a push on owner assignment in Omnichannel Tickets assigned to a representative must be automatically placed in that representative's queue.
A customer initiates a conversation from the portal, and the conversation reaches the Omnichannel system. Now, based on the routing rules condition defined in the routing system, it starts routing the conversation to the appropriate queues.
When the conversation reaches to the queues, the work assignment system assigns the conversation based on triggers.
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-service/routing-work-distribution-oca

QUESTION 7
DRAG DROP
You need to set up users with permissions to use the digital messaging channels.
Which role should you assign to each user? To answer, drag the appropriate roles to the correct groups of users. Each role may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.

Select and Place:

Roles

Omnichannel supervisor

Omnichannel agent

Productivity tools user

Productivity tools administrator

Answer Area

Group of users	Role
Case managers	
Case representatives	
Customer satisfaction representatives	

Correct Answer:

Roles

- Productivity tools administrator

Answer Area

Group of users	Role
Case managers	Omnichannel supervisor
Case representatives	Omnichannel agent
Customer satisfaction representatives	Productivity tools user

Section:
Explanation:
Box 1: Omnichannel supervisor
Case managers schedule shifts and are a point of escalation.
Omnichannel supervisor: Required for performing supervisor tasks.
Businesses need to monitor and manage the efficiency levels of agents in their ongoing conversations with customers. The enhanced supervisor experience provides supervisors with timely insights and metrics on the efficiency of the service delivery of agents and opportunities to help agents deliver better support to customers.
In this enhancement to the supervisor experience in Omnichannel for Customer Service, supervisors can:
Drill down to specific agents and look at their operational metrics.
Manage agent availability remotely.
Box 2: Omnichannel agent
Case representatives handle incoming calls, provide information to patients for appointments, and schedule follow-up calls with doctors. Case representatives can also help with people who want to chat online.
Omnichannel agent: Required for performing agent tasks.
As an Omnichannel agent, you can use queues to manage the work items that are assigned to you via queues. Therefore, you can focus on the tasks at hand and ensure better customer service. The application empowers you to work on simultaneous conversations with multiple customers. You get a holistic view of a customer's data and can see the details of the customer's previous interactions. In this way, you can be sure that you have all the available information that you might need to resolve the customer's issue.
Box 3: Productive tools user
Customer satisfaction representatives monitor all activity and ensure that there is a uniform process for all calls.
Productivity tools user: Required by users of Dynamics 365 Productivity Tools.
Agent productivity tools use intelligence and automation to enable agents to find answers to customer questions and help resolve customer issues quickly, thereby improving satisfaction in service delivery.
Incorrect:
Not Productivity tools administrator:
Productivity tools administrator: Required by administrator users of Dynamics 365 Productivity Tools.
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-service/omnichannel-agent-overview
https://docs.microsoft.com/en-us/dynamics365-release-plan/2020wave1/dynamics365-customerservice/omnichannel-supervisor-experience-enhancements
https://docs.microsoft.com/en-us/dynamics365-release-plan/2021wave1/service/dynamics365-customer-service/agent-productivity

QUESTION 8
HOTSPOT
You need to select which setting needs to be configured for each setup.
Which settings should you select? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Hot Area:

Answer Area

Setup	Setting
Ticket routing	▼
	Workstream
	Rating Model
	Bookable Resource Characteristic Type
	Resource Category
Representative specialty	▼
	Workstream
	Rating Model
	Bookable Resource Characteristic Type
	Resource Category
Spanish	▼
	Workstream
	Rating Model
	Bookable Resource Characteristic Type

Answer Area:

Answer Area

Setup	Setting
Ticket routing	[dropdown]
	Workstream _(selected)_
	Rating Model
	Bookable Resource Characteristic Type
	Resource Category
Representative specialty	[dropdown]
	Workstream
	Rating Model _(selected)_
	Bookable Resource Characteristic Type
	Resource Category
Spanish	[dropdown]
	Workstream
	Rating Model
	Bookable Resource Characteristic Type _(selected)_

QUESTION 9
You need to set up the analytics functionality.
What should you do?

A. Select the System Management menus and configure them in the settings.
B. Connect the data through Dynamics 365 Customer Service to Dynamics 365 Customer Service Insights.
C. Connect the data through Dynamics 365 Customer Service Insights to Dynamics 365 Customer Service.
D. Install the solution and menu items that will appear in Dynamics 365 Customer Service.
E. Create a new dashboard in Dynamics 365 Customer Service and select the correct information.

Correct Answer: E
Section:
Explanation:
Customer Service Insights is now embedded in Dynamics 365 Customer Service. After it is enabled, this experience allows you to start seeing historical analytics directly within the Customer Service environment. Several reports and dashboards can be viewed by your management team.
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-service/introduction-customer-serviceanalytics

QUESTION 10
You need to configure the system to meet the workspace requirements for case representatives.
Which role should you assign to case representatives?

A. Owner
B. Maker
C. Viewer
D. Customer Service Schedule Administrator
E. CSR Manager

Correct Answer: C
Section:

Exam C

QUESTION 1
You are implementing Omnichannel for Customer Service for a company.
The company wants agents to serve customers through both the company's portal and Facebook page.
You need to enable the appropriate channels.
Which two channels should you enable? Each correct answer presents part of the solution.
NOTE: Each correct selection is worth one point.

A. SMS channels
B. Chat
C. Facebook
D. WhatsApp
E. Social channels

Correct Answer: B, C
Section:
Explanation:
Use Chat
If you want to help your customers using live chat, you can use the Chat for Dynamics 365 Customer Service channel.
Use the Facebook channel.
Note: Social channels
If you want to help your customers using social media, you can use the following social channels:
Apple Messages for Business
Facebook
Google's Business Messages
WhatsApp through Twilio
Twitter
WeChat
LINE
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-service/channels
https://docs.microsoft.com/en-us/dynamics365/customer-service/facebook

QUESTION 2

Your company uses Dynamics 365 Customer Service.

You are designing a survey to send out each time a case closes. The survey must adapt to display additional questions within the same survey if a customer chooses Dissatisfied as a survey answer.

You need to configure the survey.

Which feature should you use?

A. Branching rule

B. Multiple-page survey

C. Multiple answer

D. Post-survey message

Correct Answer: A

Section:

Explanation:

Branching rules allow you to customize the flow of your survey. You can show or hide questions, choose to navigate to another question or survey, or even open a website based on the response to a question. Branching rules make your surveys interactive and ensure that only relevant questions are displayed to respondents.

Reference:

https://docs.microsoft.com/en-us/dynamics365/customer-voice/create-branching-rule

QUESTION 3

You are an Omnichannel supervisor at a company. You install a dashboard in Power BI.

You need to ensure that managers are able to access the intraday insights dashboard.

What should you do?

A. From the supervisor configuration, add all users to the intraday insights dashboard.

B. From the agent configuration, promote the users to supervisors.

C. From universal service desk, enable all dashboards.

D. From the supervisor configuration, add the required users.

E. From Power Bl, share the dashboard with the entire organization.

Correct Answer: D

Section:

Explanation:

Reference:

https://docs.microsoft.com/en-us/dynamics365/customer-service/configure-intraday-dashboardsupervisor

QUESTION 4

You are a Dynamics 365 for Customer Service administrator creating surveys for Voice of the Customer.

You need to create a customer service satisfaction survey and embed it on a website.

Which two actions should you perform? Each correct answer presents part of the solution.

NOTE: Each correct selection is worth one point.

A. Copy the portal web link and paste it into your website.

B. Copy the URL from the Anonymous link field and paste it into your website.

C. On the Voice of the Customer survey, select Run in iFrame.

D. Copy the HTML code from the iFrame URL field and paste it on your website.

Correct Answer: C, D

Section:

Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-engagement/voice-ofcustomer/distribute-survey

QUESTION 5
You are a Dynamics 365 for Customer Service administrator creating surveys for Voice of the Customer.
You must display the question: Have you used the product before? If the response is Yes, you must display additional questions concerning the product. If the answer is No, you must display a different set of questions concerning other products.
You need to select a survey feature to use.
Which survey feature should you use?

A. Answer tag

B. Response routing

C. Piping

D. List of ratings

E. Basic

Correct Answer: B
Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-engagement/voice-of-customer/designadvancedsurvey#design-interactive-surveys-by-using-response-routing

QUESTION 6
You are a Dynamics 365 Customer Service system administrator. You work with the Customer Service Hub application.
You need to enable entities for service-level agreements (SLAs).
For which entity can you enable SLAs?

A. Contract

B. Business unit

C. KPIs

D. Customer service schedule

E. Holiday schedule

F. Account

Correct Answer: F
Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-service/enable-entities-service-levelagreements

QUESTION 7
A customer's entitlement is not available to assign to a case.
You need to determine the cause of the customer's issue.
What are two possible reasons for the issue? Each correct answer presents a complete solution.
NOTE: Each correct selection is worth one point.

A. The entitlement is active

B. The entitlement is in waiting status

C. The entitlement is expired

D. The entitlement was renewed

E. The entitlement is set as the default

Correct Answer: B, C
Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-service/create-entitlement-definesupport-terms-customer

QUESTION 8
A P-L-U-S company has a service level agreement (SLA) that they will get a call back from the call center within three business days.
The call center regular hours are Monday through Friday 8:00 a.m.-11:00 p.m. Eastern time.
The call center is closed on New Year's Day and the day after New Year's. New Year's Day is on a Thursday this year.
The company calls for support on the Tuesday before New Year's Day at 8:00 a.m.
You need to determine the call center's deadline for the SLA.
When will the call center miss their SLA?

A. The Monday after New Year's Day at 8:00 a.m. Eastern time

B. The Friday after New Year's Day at 8:00 a.m. Eastern time

C. The Tuesday after New Year's Day at 8:00 a.m. Eastern time

D. The Saturday after New Year's Day at 8:00 a.m. Eastern time

Correct Answer: C
Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-service/define-service-level-agreements

QUESTION 9
You are a customer service schedule administrator.
A customer has a custom entity that requires its own schedule board.
You need to create the schedule board. You configure the custom entity in the Resource Scheduling parameters.
What should you do next?

A. Add a new resource requirement. Add a new view for the custom entity.

B. Change the default entity name to the custom name. Create a new schedule board for the custom entity.

C. Disable the schedule board. Configure Resource Scheduling Optimization.

D. Configure the booking metadata. Create a new schedule board for the custom entity.

Correct Answer: A
Section:
Explanation:
Before scheduling a lead, a related resource requirement must be created.
Add a requirement view to the schedule board.
After creating a requirement for the lead, it will appear in the Open Requirements view in the lower pane of the schedule board that shows all open requirements related to any schedulable entity. This is a default view for resource scheduling.

However, the views in the lower pane of the schedule board are simply system views and can be edited and added to. It's common to add custom resource requirements views for work orders (or leads in our example). You can create a schedule board view that shows only leads to be scheduled.

Reference:

https://docs.microsoft.com/en-us/dynamics365/field-service/schedule-new-entity

QUESTION 10
Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution. Determine whether the solution meets the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.

An electrical engineering company is implementing Dynamics 365 Customer Service.

Engineers schedule work in one-hour blocks.

Engineers who complete a job before the end of the one-hour block must not be able to start a new job in that some block.

Engineers who require part of an additional one-hour block to complete a job must not be able to start a new job in that additional block.

You need to configure the fulfillment preference to meet the requirements.

Proposed solution: Create a fulfillment record and set the interval to one hour.

Does the solution meet the goal?

A. Yes

B. No

Correct Answer: A
Section:
Explanation:
Fulfillment preferences are customizable entities that let you choose how schedule assistant results are displayed, like with neat hourly appointments or morning and afternoon time windows.

By default, the schedule assistant displays results based entirely on resource schedules and the earliest available time, such as 10:39 AM. With fulfillment preferences set to hourly, the same resource's availability shows as 11:00 AM. This makes it simpler for the scheduler to view and understand availability and communicate it to the customer.

Intervals Intervals display schedule assistant results in neat time slots that dictate start time of subsequent bookings. When configured as 30-minute intervals, the schedule assistant will display a resource available at 9:27 AM as available at 9:30 AM and will book the start time (arrival time) for 9:30 AM.

This includes travel time for onsite requirements and work orders, meaning travel time will begin before 9:30 AM, and a field resource will arrive and start work at 9:30 AM.

Reference:

https://docs.microsoft.com/en-us/dynamics365/field-service/set-up-time-groups

QUESTION 11
Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution. Determine whether the solution meets the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.

An electrical engineering company is implementing Dynamics 365 Customer Service.

Engineers schedule work in one-hour blocks.

Engineers who complete a job before the end of the one-hour block must not be able to start a new job in that some block.

Engineers who require part of an additional one-hour block to complete a job must not be able to start a new job in that additional block.

You need to configure the fulfillment preference to meet the requirements.

Proposed solution: Configure the working hours calendar to allow one-hour resource booking blocks.

Does the solution meet the goal?

A. Yes

B. No

Correct Answer: B
Section:

Explanation:

Instead: Proposed solution: Create a fulfillment record and set the interval to one hour.

Note: Fulfillment preferences are customizable entities that let you choose how schedule assistant results are displayed, like with neat hourly appointments or morning and afternoon time windows.

By default, the schedule assistant displays results based entirely on resource schedules and the earliest available time, such as 10:39 AM. With fulfillment preferences set to hourly, the same resource's availability shows as 11:00 AM. This makes it simpler for the scheduler to view and understand availability and communicate it to the customer.

Intervals Intervals display schedule assistant results in neat time slots that dictate start time of subsequent bookings. When configured as 30-minute intervals, the schedule assistant will display a resource available at 9:27 AM as available at 9:30 AM and will book the start time (arrival time) for 9:30 AM.

This includes travel time for onsite requirements and work orders, meaning travel time will begin before 9:30 AM, and a field resource will arrive and start work at 9:30 AM.

Reference:

https://docs.microsoft.com/en-us/dynamics365/field-service/set-up-time-groups

QUESTION 12

You send surveys to customers who have opened cases within the past month.

You need to send a summary of the survey results to individuals who do not have a Dynamics 365 license.

What are two possible ways to achieve the goal? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

A. Run the summary report. Export the report to Microsoft Excel. Send the Excel file to the users.

B. Run the survey summary report. Send a link to the report from within Dynamics 365.

C. Create a dashboard of the survey summary reports and share the dashboards with the users.

D. Create a view with the data, and then email a link.

E. Run the survey summary report. Print the report to a PDF file. Send the PDF file to the users.

Correct Answer: A, E
Section:

QUESTION 13

You are creating surveys for Voice of the Customer (VoC).

You need to configure VoC to ensure that recipients can unsubscribe to surveys.

Which two survey features should you use? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

A. Add an Unsubscribe check box after each question.

B. Set the Allow unsubscribe setting to Yes.

C. Give users the option to unsubscribe from different features of the survey.

D. Configure the survey to display when Dynamics 365 customers receive email and enable the Unsubscribe option.

Correct Answer: B, D
Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-engagement/voice-of-customer/designadvancedsurvey#add-the-unsubscribe-option-to-a-survey

QUESTION 14

You are an administrator of a Dynamics 365 Customer Service system for a computer support company.

Team members must handle cases as follows:

A case for a new customer follows a different process than for a returning customer.

A case for a returning customer who has a contract follows a different process than for a customer who is pay as you go.

All cases must be researched and resolved.

Cases must be handled in a manner that is simple to maintain.

You need to ensure that all team members follow the same process for handling cases.

What should you do?

A. Create a business process now that branches.

B. Create two different forms and a business process flow for each type of customer.

C. Create a Power Automate now that branches.

D. Create two different queues for the different types of customers.

Correct Answer: A
Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/customerengagement/onpremises/customize/enhance-business-process-flows-branching?view=op-9-1

QUESTION 15
A P-L-U-S company is implementing a customized app that will automatically route cases.

You need to determine the correct URL to connect to the app location in the cloud.

Which URL format should you use?

A. https://"<"org">.dynamics.com/apps

B. https://"<"org">.crm.dynamics.com/

C. https://<orgname>.<CRMRegion>.dynamics.com/Apps/uniquename/<AppUniqueName>

D. https://"<"org">/apps

Correct Answer: A
Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-service/create-rules-automatically-routecases

QUESTION 16
A P-L-U-S company must standardize the management of web leads and leads generated across their internal and external sales teams.

You need to create an entitlement.

Which type of entitlement should you create?

A. Multi-channel

B. Omnichannel

C. Teams channel

Correct Answer: B
Section:
Explanation:
Omni-channel: An omni-channel solution offers two or more channel experiences to customers, and the customer experience is consistent across channels. The context of the case and customer is used to streamline the experience across apps. For example, a customer starts on a self-service portal but then starts a chat conversation. All the pages that the customer has opened are available to the agent.

By providing multi-channel or omni-channel solutions to your customer, you help guarantee that each customer can interact with your organization by using the option that's best for him or her.

When you provide multi-channel or omni-channel solutions, you must also consider the effect on the organization. Although it's important to make sure that customers have a consistent experience when they work with the

different channels, it's also important to remember that each channel is different.
Reference:
https://www.globalits.bh/how-customer-service-can-handle-entitlement-channels-in-dynamics-365/

QUESTION 17
A GOV company uses Omnichannel for Customer Service. An administrator creates a report. You must change reports to intraday insight reports without using customization. You need to determine why you are unable to switch to the intraday insight reports. What is the issue?

A. The intraday insight reports need to be created in FetchXML first.
B. Users can configure only their own intraday insight reports.
C. Only administrators can configure the intraday insight reports.
D. The intraday insight reports must be configured from Dynamics 365 Customer Service settings.

Correct Answer: D
Section:

QUESTION 18
A GOV company uses Dynamics 365 Customer Service.
Telemetry on agent case resolution time reveals that agents spend 20 minutes on average resolving cases. Analysis determines that resolution duration is increased because agents are often required to view and modify data on the related account.
The company requires a solution that allows agents to enter data in a single screen and edit multiple records without navigating to each record.
You need to create the solution.
Which two actions should you perform? Each correct answer presents part of the solution.
NOTE: Each correct selection is worth one point

A. Configure the editable grid of the case view to include account details.
B. Add an editable grid control to the case view.
C. Configure the Nested grid view.
D. Add an editable grid of the account on the case form.

Correct Answer: D
Section:

QUESTION 19
DRAG DROP
A GOV company uses Dynamics 365 Customer Service.
You need to implement queues to meet company requirements.
Which types of queues should you use? To answer, drag the appropriate queue types to the correct requirements. Each queue type may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.
NOTE: Each correct selection is worth one point.

Select and Place:

Queue types

| Private |
| Public |

Answer Area

Requirement	Queue type
Assign cases to teams and share cases with select teams based on product types.	Queue type
Share cases that cannot be automatically routed to a team with the entire company.	Queue type

Correct Answer:

Queue types

| |
| |

Answer Area

Requirement	Queue type
Assign cases to teams and share cases with select teams based on product types.	Private
Share cases that cannot be automatically routed to a team with the entire company.	Public

Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-service/set-up-queues-manage-activities-cases

QUESTION 20
You are a customer service representative using Dynamics 365 for Customer Service.
You need to identify and eliminate duplicate cases.
What should you do?

A. Configure Dynamics 365 AI for Customer Service

B. Use business rules

C. Merge cases

D. Use parent-child case relationships

Correct Answer: B
Section:

QUESTION 21
You are a system administrator for Dynamics 365 for Customer Service.

All child cases must inherit the product, customer name, case title, and case type from the parent case. Parent cases must not be closed until all child cases are closed.
You need to configure cases.
What should you do?

A. Set the closure preference setting to Don't allow parent case closure until all child cases are closed.

B. Set the closure preference setting to Don't allow parent case closure until all child cases are closed. In Settings, navigate to Customizations. On the case entity, update the Incident-Incident Resolution case relationship field mapping to include the fields.

C. Create a business rule.

D. Add the product and case type fields as fields that child cases will inherit from the parent case. Set the closure preference setting to Don't allow parent case closure until all child cases are closed.

Correct Answer: D
Section:

QUESTION 22
You manage Dynamics 365 for Customer Service.
You need to configure automatic case creation for emails received by customers who have a support contract.
What should you do?

A. Configure service level agreements to be on hold until a call can be made to the customer.

B. Create an automatic record creation and update rule. Set the source type to email. Configure the rule to send automatic email responses to customers when records are created.

C. Create an automatic record creation and update rule. Set the source type to service activity.
   Configure the rule to send automatic email responses to customers when records are created.

D. Create an automatic record creation and update rule. Set the source type to email. If a valid entitlement exists, configure the rule to create a case.

Correct Answer: D
Section:

QUESTION 23
A customer service organization plans to implement knowledge management for a custom entity named Root Cause Analysis.
Users must be able to search, link, and rate knowledge articles. Users must be provided with suggested knowledge articles.
You need to configure Dynamics 365 for Customer Service.
Which three actions should you perform? Each correct answer presents part of the solution.
NOTE: Each correct selection is worth one point.

A. Navigate to the Knowledge Base Management Settings wizard. Then, navigate to Record types and select Root Cause Analysis.

B. Add a lookup to the article entity.

C. In Solution Explorer, expand the Root Cause Analysis entity and select Forms. Edit the main form and configure a knowledge base search control.

D. In Solution Explorer, expand the Root Cause Analysis entity and select Forms. Edit the main form and configure a subgrid for knowledge articles.

E. In Solution Explorer, select the Root Cause Analysis entity and then select Knowledge management.

Correct Answer: A, C, E
Section:

QUESTION 24
A P-L-U-S company implements Dynamics 365 for Customer Service. You are assigned a case.
You accidently close the case before completing your work.
You need to ensure that you can continue to work on the case.
What should you do?

A. Reassign the case

B. Reactivate the case

C. Clone the case

D. Change the status reason to In Progress

Correct Answer: B
Section:

QUESTION 25
A P-L-U-S company uses Dynamics 365 for Customer Service. A case in the queue is routed to you.
You will be going on a vacation.
You need to assign the case to someone else.
What should you do?

A. Release the case.

B. Route the case to another queue.

C. Share the case.

D. Escalate the case

Correct Answer: A
Section:

QUESTION 26
Customer service representatives are not able to manually add service-level agreements (SLAs) to a record.
You need to enable on-demand SLAs.
What should you do?

A. Configure the scope of the workflow

B. Publish the on-demand SLA

C. Activate the SLA

D. Request an administrator to add the SLA field to the entity form

Correct Answer: D
Section:
Explanation:

QUESTION 27
You are a Dynamics 365 for Customer Service administrator.
You need to deactivate entitlements.
When should you deactivate entitlements? Each correct answer presents a complete solution.
NOTE: Each correct selection is worth one point.

A. A customer's entitlement has ended and no more support is desired.

B. A customer renews an entitlement for 100 more hours or one year.

C. A customer calls and wants to know how many hours of support remain.

D. The customer must change remaining support hours from all email support to one-half email support and one-half phone support.

E. You need to add notes to the customer's entitlement.

Correct Answer: D, E
Section:

QUESTION 28
You are a customer service manager using Dynamics 365 for Customer Service.
You need to restrict support to the products that a customer has purchased.
What should you do?

A. Add the product to the account

B. Add the products to the case

C. Add the products to the customer's entitlement

D. Add the products to the customer

Correct Answer: C
Section:

QUESTION 29
You are a Dynamics 365 Customer Service representative.
You need to take the appropriate action when creating new cases to ensure that the automated routing rule is applied.
What should you use?

A. Add to queue

B. Run workflow

C. Save and route

D. Share

Correct Answer: A
Section:
Explanation:
Routing rules define how conversations are routed to different queues. Each routing rule has a condition and a destination queue. If the rule condition is evaluated as True, then the conversation is routed to the destination queue.
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-service/routing-rules

QUESTION 30
You are using Dynamics 365 Customer Service to create and activate entitlements.
Customer service representatives state that the entitlement status is set to Waiting, and they cannot use the entitlement. You must ensure customer service representatives can use the entitlement.
You need to identify the entitlement issue.
What is the cause of the issue?

A. The Products or Contact field values have not been configured before activation.

B. The start date of the entitlement is in the future.

C. The entitlement has expired and is awaiting renewal.

D. The end date of the entitlement has been incorrectly configured to a date that has already passed.

Correct Answer: B
Section:
Explanation:
If the start and end date of the entitlement fall in the future, the status of the entitlement is set to Waiting. On the start date, the status automatically changes to Active. If the end date is in the past, the entitlement is set to Expired.
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-service/create-entitlement-definesupport-terms-customer

QUESTION 31
DRAG DROP
You manage Dynamics 365 for Customer Service.
You need to create a list of holidays and ensure that existing service-level agreements (SLAs) observe those holidays.
Which three actions should you perform in sequence? To answer, move the appropriate actions from the list of actions to the answer area and arrange them in the correct order.

Select and Place:

Correct Answer:

Actions

Update the SLA and associate the holiday schedule
Create an entitlement and select the holiday schedule
Update the SLA and associate the entitlements

Answer Area

Create a holiday schedule and holiday records
Create a customer service schedule and select the holiday schedule
Update the SLA and select the customer service schedule

(◀) (▶)   (▲) (▼)

Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-engagement/customer-service/create-customer-service-schedule-define-work-hours

QUESTION 32
HOTSPOT
You are a Dynamics 365 for Customer Service administrator.
You need to categorize activities and cases by using queues.
How should you categorize each record? To answer, select the appropriate options in the answer area.
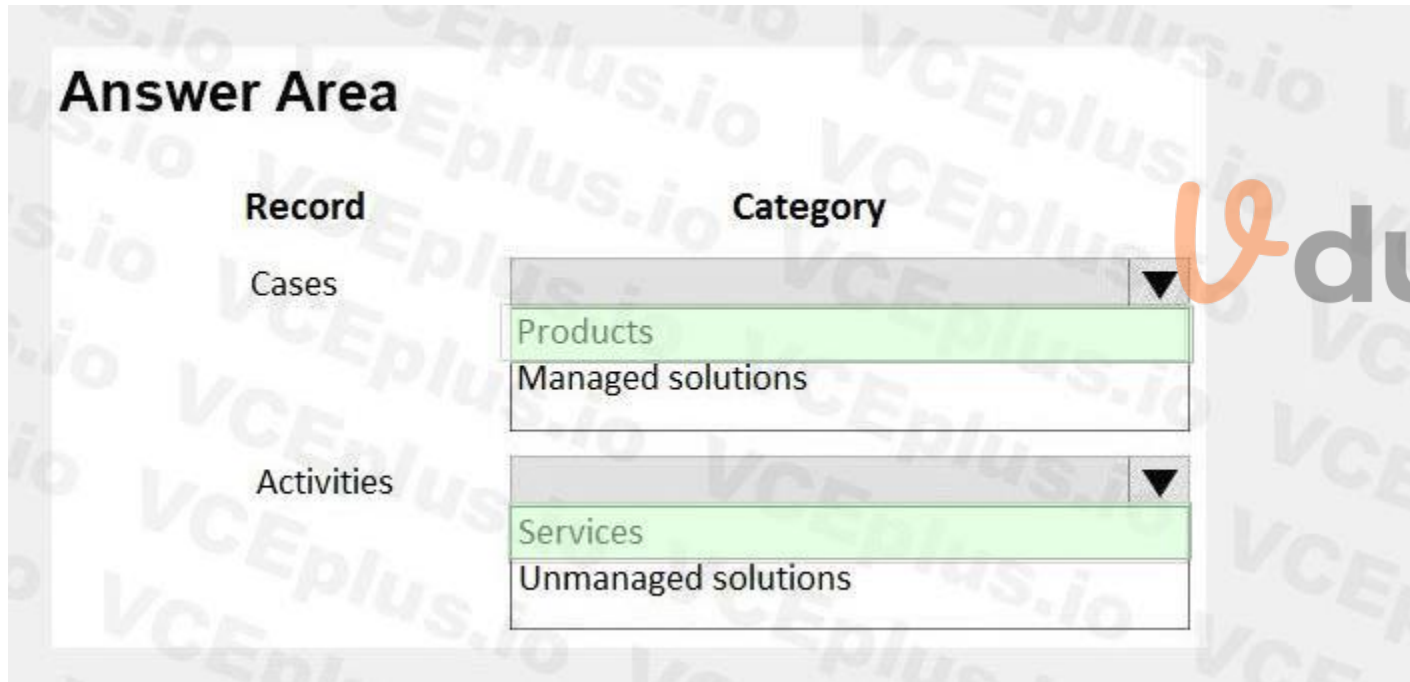NOTE: Each correct selection is worth one point.

Hot Area:

Answer Area:

Section:
Explanation:

QUESTION 33
DRAG DROP
You are a Dynamics 365 for Customer Service administrator.
Your company requires a new phone-to-case business process flow for customer service representatives to follow.
The stages are as follows:
1. Verification
2. Acknowledgement and research
3. Resolution
Customer service representatives must send an email to the customer when a case enters the acknowledgement-and-research stage.
You need to create the required business process flow and components.

Which three actions should you perform in sequence? To answer, move the appropriate actions from the list of actions to the answer area and arrange them in the correct order.

Select and Place:

Actions

Create and activate the case-acknowledgement email workflow as follows:

In Available to run, select **Run this workflow** in **the background** and **As a child process.**

Create and activate the case-acknowledgement email workflow as follows:

In Available to run, select **As an on-demand process.**

Create and activate the process flow with each of the stages. Add the case acknowledgement email workflow to the acknowledgement-and-research stage.

Create a new business process flow record for the case entity.

Create and activate the process flow with each of the stages. Add the case acknowledgement email workflow as a global workflow. Trigger the workflow for the acknowledgment-and-research stage.

Answer Area

Correct Answer:

Actions

Create and activate the case-acknowledgement email workflow as follows:

In Available to run, select **As an on-demand process.**

Create and activate the process flow with each of the stages. Add the case acknowledgement email workflow to the acknowledgement-and-research stage.

Answer Area

Create and activate the case-acknowledgement email workflow as follows:

In Available to run, select **Run this workflow** in the background and **As a child process.**

Create a new business process flow record for the case entity.

Create and activate the process flow with each of the stages. Add the case acknowledgement email workflow as a global workflow. Trigger the workflow for the acknowledgment-and-research stage.

Section:

Explanation:

References:

https://docs.microsoft.com/en-us/dynamics365/customer-engagement/customize/create-business-process-flow
https://docs.microsoft.com/en-us/dynamics365/customer-engagement/customize/workflow-processes

QUESTION 34

Your company uses Dynamics 365 Customer Service. You create the following support offerings.

Customers must choose one of the three offerings.

Email only

Phone only

Half phone and half email

You allocate 50 cases to each support offering.

You need to create the entitlement with terms that adhere to the support offerings.

What are two possible ways to achieve this goal? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

A. Create one entitlement template that includes the three different terms. Apply the template to the customer, and then remove the terms that do not apply.

B. Create a new entitlement for each new support offering for the customer, with terms equal to 25 phone calls and 25 emails.

C. Create a new entitlement for each new support offering for the customer, with terms equal to 50 phone calls and 50 emails.

D. Create different entitlement templates for each set of terms. Apply the appropriate template to the customer.

E. Create three entitlement templates with terms for 50 calls and 50 emails. Apply the template to the customers as they sign the support offering.

Correct Answer: C, E
Section:
Explanation:
Note: Quickly create other entitlements prefilled with the basic information like the start and end date, service level agreement (SLA), allocation type, and total term by using an entitlement template in Dynamics 365 Customer Service. For example, create a template for a standard entitlement, and then apply this template for every standard customer in your organization.
Template information include:
Total Term: Specify the total amount of support the customer is entitled to with respect to the allocation type. For example, if the allocation type is number of cases and you specify 100 in Total term, then the customer is entitled to support up to 100 cases.
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-service/create-entitlement-definesupport-terms-customer
https://docs.microsoft.com/en-us/dynamics365/customer-service/set-up-entitlements-templates

QUESTION 35
You are a Dynamics 365 system administrator.
The customer service desk needs to be able to apply service level agreements (SLAs) on demand to customers that do not have SLAs.
You need to determine how SLAs on demand can be assigned.
What are two possible ways to achieve this goal? Each correct answer presents a complete solution.
NOTE: Each correct selection is worth one point.

A. Use an existing customer SLA and change the conditions after assigning the SLA to the customer record.

B. Create a new SLA for each case that does not have a customer SLA.

C. Go into the SLA configuration and assign it to a customer.

D. Automatically apply SLAs to records based on business logic.

E. Assign SLAs manually to records.

Correct Answer: D, E
Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-service/define-service-levelagreements#apply-slas-on-demand

QUESTION 36
You are using Dynamics 365 Customer Service.
You need to ensure that customers request support by using email, phone or web, based on their signed contracts with your company.
What should you do?

A. Configure entitlement channels.

B. Create an entity for each channel and configure the relationship with the entitlement.

C. Create queues for each channel.

D. Configure routing rules.

Correct Answer: A
Section:
Explanation:
Reference:

QUESTION 37
A P-L-U-S company uses Dynamics 365 Customer Service. A client purchases a premium support package that allows six support incidents over two years.
You need to set up support entitlement enforcement.
Which three attributes should you configure? Each correct answer presents a part of the solution.
NOTE: Each correct selection is worth one point.

A. Specify the remaining item

B. Specify the total term

C. Specify the end date

D. Set the Restrict based on entitlement terms value

E. Specify the service-level agreement (SLA)

Correct Answer: B, C, D
Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-service/create-entitlement-definesupport-terms-customer

QUESTION 38
Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution. Determine whether the solution meets the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.
After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.
An electrical engineering company is implementing Dynamics 365 Customer Service.
Engineers schedule work in one-hour blocks.
Engineers who complete a job before the end of the one-hour block must not be able to start a new job in that some block.
Engineers who require part of an additional one-hour block to complete a job must not be able to start a new job in that additional block.
You need to configure the fulfillment preference to meet the requirements.
Proposed solution: Create a timegroup with the preference setting of one hour.
Does the solution meet the goal?

A. Yes

B. No

Correct Answer: B
Section:
Explanation:
Time groups enable schedulers to search and view results as blocks of time when using the schedule assistant. Typical examples include mornings, afternoon, nights, and 2-hour windows. Unlike intervals, time groups do not dictate the start time of subsequent bookings. Time groups organize results, but leave the start time/arrival time as-is, based on the particular resource's schedule.
Instead: Proposed solution: Create a fulfillment record and set the interval to one hour.
Note: Fulfillment preferences are customizable entities that let you choose how schedule assistant results are displayed, like with neat hourly appointments or morning and afternoon time windows.
By default, the schedule assistant displays results based entirely on resource schedules and the earliest available time, such as 10:39 AM. With fulfillment preferences set to hourly, the same resource's availability shows as 11:00 AM. This makes it simpler for the scheduler to view and understand availability and communicate it to the customer.
Intervals Intervals display schedule assistant results in neat time slots that dictate start time of subsequent bookings. When configured as 30-minute intervals, the schedule assistant will display a resource available at 9:27 AM as available at 9:30 AM and will book the start time (arrival time) for 9:30 AM.
This includes travel time for onsite requirements and work orders, meaning travel time will begin before 9:30 AM, and a field resource will arrive and start work at 9:30 AM.
Reference:
https://docs.microsoft.com/en-us/dynamics365/field-service/set-up-time-groups

QUESTION 39
A P-L-U-S company closes the business each year for nine business days.
You need to configure the system to reflect the business closure while minimizing the number of records that you must create in the system.
What should you create?

A. nine customer service calendar records of a one-day duration

B. two holiday calendar records of a seven-day duration

C. three holiday schedule records of a three-day duration

D. one business closure record of a nine-day duration

Correct Answer: D
Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-service/set-when-business-closed-csh

QUESTION 40
A fitness company has several locations.
The company implements Dynamics 365 Customer Service and uses it to schedule personal trainer sessions with customers.
Customers report the following issues:
Customers are assigned personal trainers who do not reside at the customer's location.
Customers are assigned personal trainers during the trainers' non-working hours.
You need to resolve the issues.
Which two settings should you configure? Each correct answer presents a complete solution.
NOTE: Each correct selection is worth one point.

A. Customer Service Calendar

B. resource skills

C. Work Hours

D. facility resources

E. Fulfillment Preferences

Correct Answer: A, C
Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-service/resources-service-scheduling

QUESTION 41
You need to ensure that an appropriate resource for sick appointments can be scheduled.
What should you configure?

A. Services

B. Queues

C. Facilities/equipment

D. Activities

Correct Answer: A

Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-service/basics-service-service-scheduling

QUESTION 42
You sign in to Dynamics 365 Customer Service as a system administrator. You attempt to configure unified record routing across digital messaging channels.
You receive the following error message:
Some required services need to be installed before unified routing can be turned on. Please contact Microsoft Support.
You need to enable unified record routing and route records.
Which three steps must you perform? Each correct answer presents part of the solution.
NOTE: Each correct selection is worth one point.

A. Set up users as leads.
B. Deploy Omnichannel for Customer Service.
C. Enable an entity for queues.
D. Set up users as contacts.
E. Provision unified routing for Customer Service only.
F. Set up users as bookable resources.

Correct Answer: B, E, F
Section:
Explanation:
BE: Provision unified routing in Customer Service with Omnichannel for Customer Service When Omnichannel for Customer Service is available but not deployed, in the Service Configuration Settings page, the following message will appear:
"Some required services need to be installed before unified routing can be turned on. Please contact Microsoft Support." F: Set up unified routing for records, prerequisites To set up record routing for Customer Service, unified routing must be enabled in your environment.
You must have users configured as bookable resource.
Etc.
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-service/provision-unified-routing
https://docs.microsoft.com/en-us/dynamics365/customer-service/set-up-record-routing

QUESTION 43
HOTSPOT
You are a Dynamics 365 for Customer Service administrator.
Members of the customer support staff must not be available on public holidays in the year 2021.
You need to configure holiday schedules.
Which actions should you perform? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Hot Area:

Answer Area

Requirement	Action
Create a new schedule.	▼
	Add a holiday
	Place the SLA on hold
Configure schedule settings.	▼
	Activate the schedule
	Specify an end date

Answer Area:

Answer Area

Requirement	Action
Create a new schedule.	▼
	Add a holiday
	Place the SLA on hold
Configure schedule settings.	▼
	Activate the schedule
	Specify an end date

Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-engagement/customer-service/set-up-holiday-schedule

QUESTION 44
DRAG DROP
You are customizing a Dynamics 365 for Customer Service implementation.
The call center manager requires a visual representation that includes the number of resolved cases by month for each call center agent. The chart must be visible to all users within the service area.
You need to create the chart.
Which three actions should you perform in sequence? To answer, move the appropriate actions from the list of actions to the answer area and arrange them in the correct order.

Select and Place:

Correct Answer:
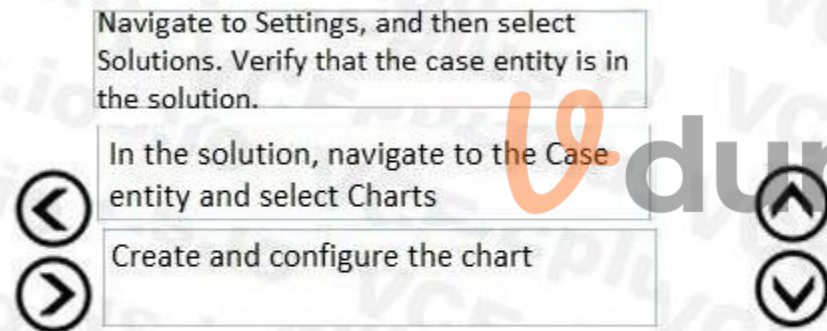
Section:
Explanation:

QUESTION 45
HOTSPOT
You are implementing Dynamics 365 for Customer Service.
You need to set up available working hours to help desk representatives who have varying schedules.
What should you do? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Hot Area:

Answer Area

Requirement	Action
Set up individual working hours.	▼
	Configure security settings and define hours for each user account
	Configure service management and all customer service calendars
	Configure administration settings and system settings
Set up new weekly schedule and recurring work hours.	▼
	Configure days off to vary by day
	Configure a fiscal year schedule
	Configure individual days off

Answer Area:

Answer Area

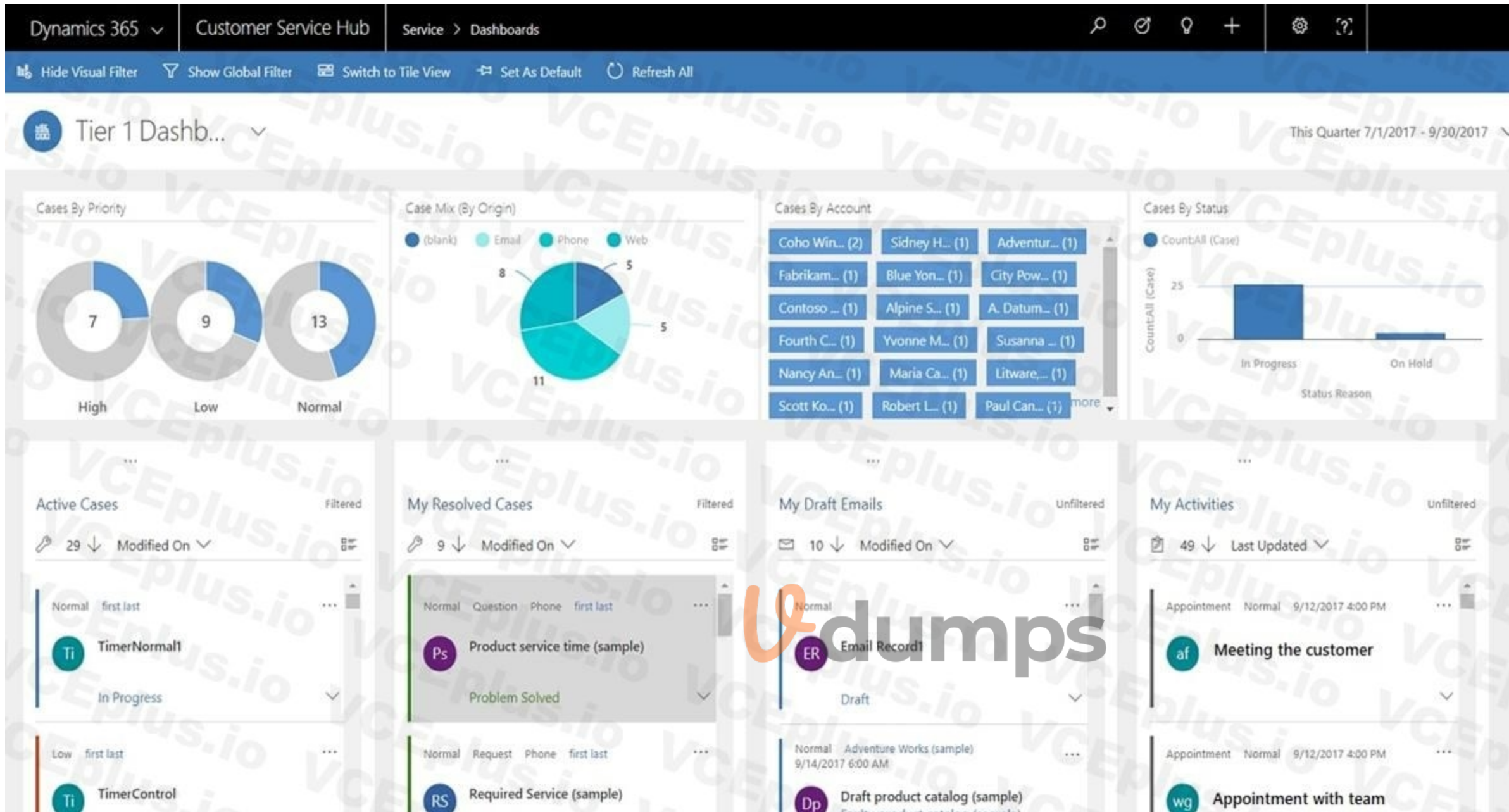| Requirement	Action
Set up individual working hours.	▼
	Configure security settings and define hours for each user account
	Configure service management and all customer service calendars
	Configure administration settings and system settings
Set up new weekly schedule and recurring work hours.	▼
	Configure days off to vary by day
	Configure a fiscal year schedule
	Configure individual days off

Section:
Explanation:

QUESTION 46
HOTSPOT
You view the interactive dashboard in the Microsoft Dynamics 365 Customer Service Hub.

Dynamics 365 | Customer Service Hub | Service > Dashboards

Hide Visual Filter   Show Global Filter   Switch to Tile View   Set As Default   Refresh All

Tier 1 Dashb...   This Quarter 7/1/2017 - 9/30/2017

Cases By Priority

7 High   9 Low   13 Normal

Case Mix (By Origin)

(blank)   Email   Phone   Web

8   5   5   11

Cases By Account

Coho Win... (2)	Sidney H... (1)	Adventur... (1)
Fabrikam... (1)	Blue Yon... (1)	City Pow... (1)
Contoso ... (1)	Alpine S... (1)	A. Datum... (1)
Fourth C... (1)	Yvonne M... (1)	Susanna ... (1)
Nancy An... (1)	Maria Ca... (1)	Litware,... (1)
Scott Ko... (1)	Robert L... (1)	Paul Can... (1)

more

Cases By Status

Count:All (Case)

CountAll (Case)   25   0   In Progress   On Hold   Status Reason

Active Cases   Filtered
29 Modified On

Normal   first last
Ti TimerNormal1
In Progress

Low   first last
Ti TimerControl

My Resolved Cases   Filtered
9 Modified On

Normal   Question   Phone   first last
Ps Product service time (sample)
Problem Solved

Normal   Request   Phone   first last
RS Required Service (sample)

My Draft Emails   Unfiltered
10 Modified On

Normal
ER Email Record1
Draft

Normal   Adventure Works (sample)
9/14/2017 6:00 AM
Dp Draft product catalog (sample)

My Activities   Unfiltered
49 Last Updated

Appointment   Normal   9/12/2017 4:00 PM
af Meeting the customer

Appointment   Normal   9/12/2017 4:00 PM
wg Appointment with team

Use the drop-down menus to select the answer choice that answers each question based on the information presented in the graphic.
NOTE: Each correct selection is worth one point.

Hot Area:

Answer Area

What dashboard type is displayed?

Single-stream dashboard standard view
Single-stream dashboard tile view
Multi-stream dashboard standard view
Multi-stream dashboard tile view

What type of filter is shown in the interactive dashboard?

Visual filter
Global filter
Name filter

Answer Area:

Answer Area

What dashboard type is displayed?

Single-stream dashboard standard view
Single-stream dashboard tile view
Multi-stream dashboard standard view
Multi-stream dashboard tile view

What type of filter is shown in the interactive dashboard?

Visual filter
Global filter
Name filter

Section:
Explanation:

QUESTION 47
DRAG DROP
You are a Dynamics 365 system administrator.
Your customer service team must define goal metrics to track and measure all resolved cases.
You need to create a goal metric with a rollup field.
In which order should you perform the actions? To answer, move all actions from the list of actions to the answer area and arrange them in the correct order.

Select and Place:

Actions

Actions
Create a new rollup field.
Define the metric. Enter metric and amount data types.
Specify details about the source data that rolls up.
Specify the date field that determines the goal period that the records will roll up into.
Specify the rollup field to track against goals.

Answer Area

(<) (>)   (∧) (∨)

Correct Answer:

Actions

Answer Area

Answer Area
Define the metric. Enter metric and amount data types.
Create a new rollup field.
Specify the rollup field to track against goals.
Specify details about the source data that rolls up.
Specify the date field that determines the goal period that the records will roll up into.

(<) (>)   (∧) (∨)

Section:
Explanation:
References:
https://docs.microsoft.com/en-us/dynamics365/customer-engagement/sales-enterprise/create-edit-goal-metric

QUESTION 48
HOTSPOT
You are configuring a Dynamics 365 for Customer Service instance.
Customer service manager cannot create new entitlements for customer service representatives.
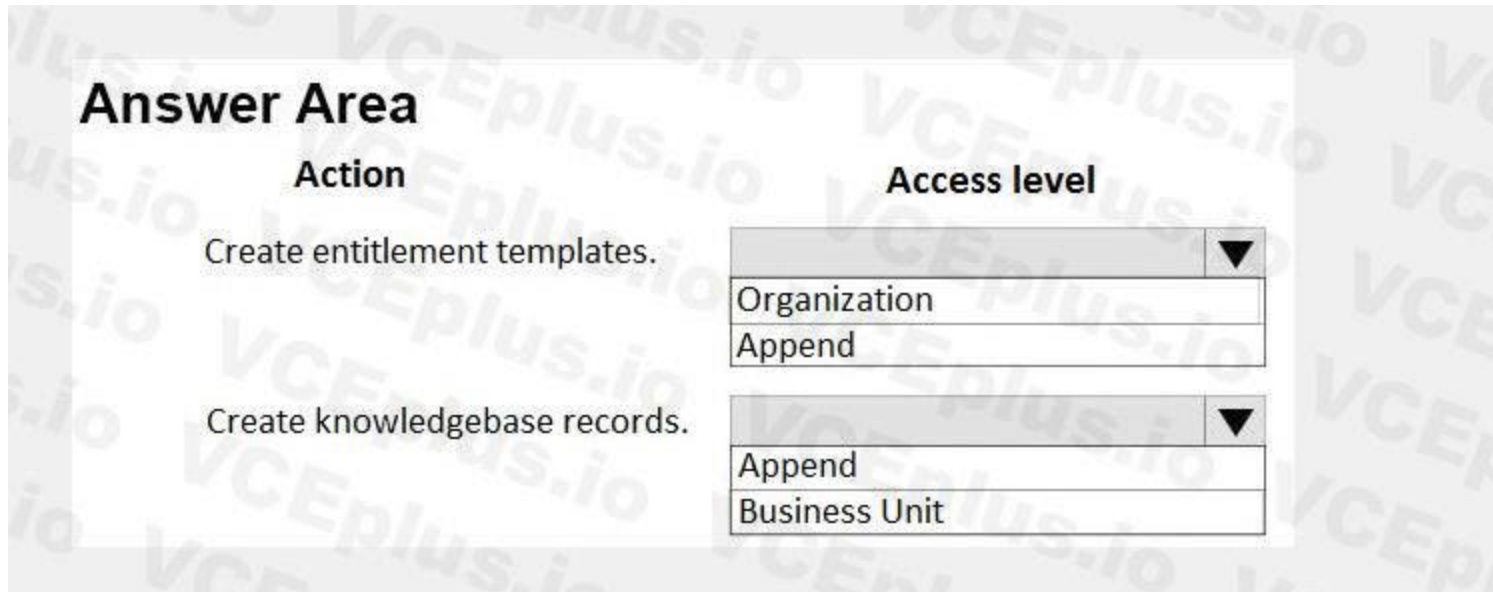You need to ensure that customer service managers can add new entitlement templates and knowledge base records for customer service representatives.
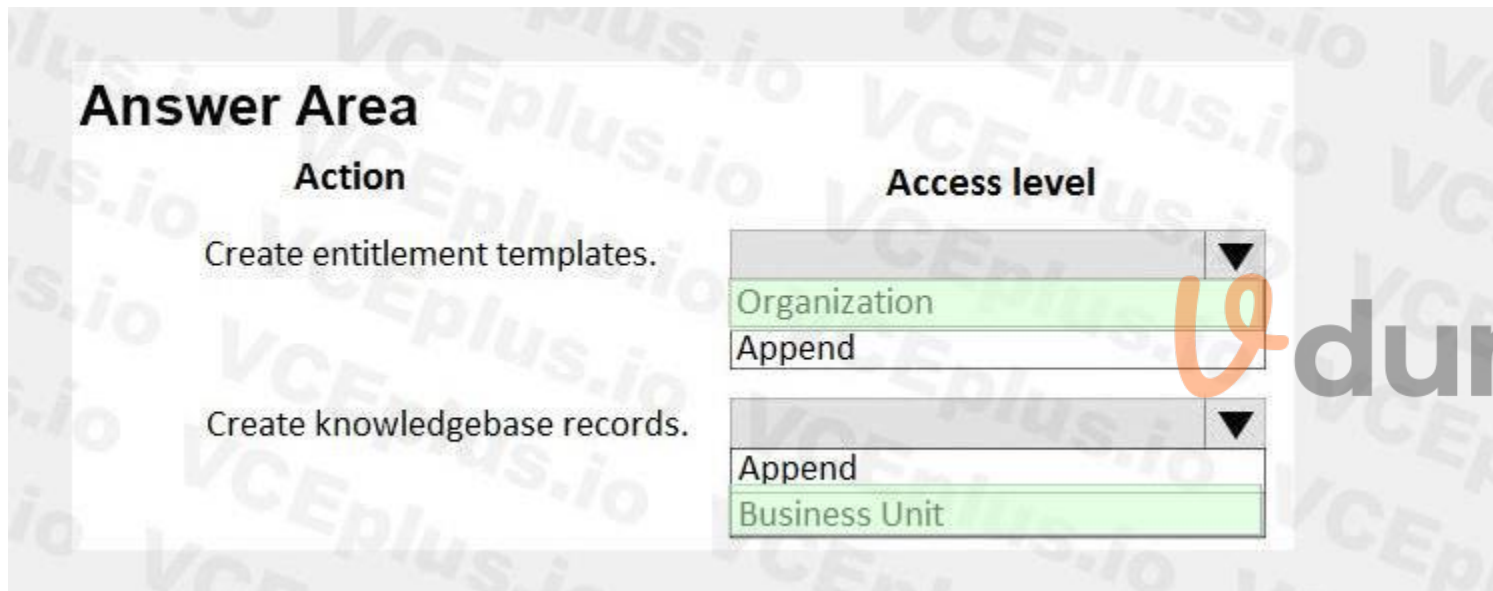Which access levels should you apply? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Hot Area:

Answer Area:

Section:
Explanation:

QUESTION 49
DRAG DROP
You are a Dynamics 365 for Customer Service administrator.
You need to import cases from a file without applying routing rules.
Which three actions should you perform in sequence? To answer, move the appropriate actions from the list of actions to the answer area and arrange them in the correct order.

Select and Place:

Actions

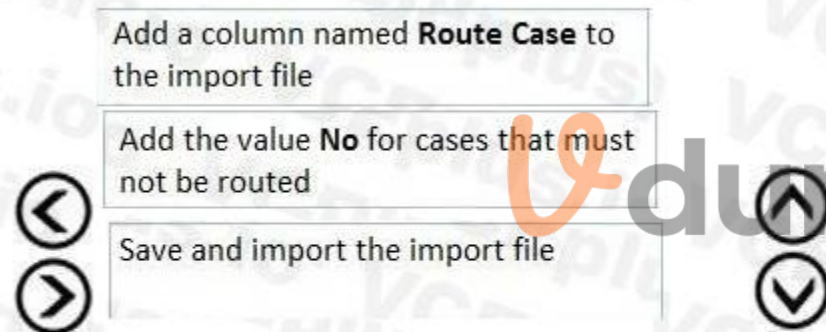| Actions |
|---|
| Save and import the import file |
| Add a row named **Route Case** to the import file |
| Add a column named **Route Case** to the import file |
| Add the value **Yes** for cases that must not be routed |
| Add the value **No** for cases that must not be routed |

Answer Area

(navigation arrows: ◁ ▷ and ︿ ﹀)

Correct Answer:

Actions

Actions
Add a row named **Route Case** to the import file
Add the value **Yes** for cases that must not be routed

Answer Area

Answer Area
Add a column named **Route Case** to the import file
Add the value **No** for cases that must not be routed
Save and import the import file

(navigation arrows: ◁ ▷ and ︿ ﹀)

Section:
Explanation:
References:
https://docs.microsoft.com/en-us/dynamics365/customer-engagement/customer-service/create-rules-automatically-route-cases

QUESTION 50
DRAG DROP
A Dynamics 365 Customer Service organization uses routing rules to escalate cases.
Security roles have not been modified or created.
You need to modify the routing rule set that is currently in use and enforce the principle of least privilege.
Which five actions should you perform in sequence? To answer, move the appropriate actions from the list of actions to the answer area and arrange them in the correct order.

Select and Place:

Actions

Actions
Verify that you have the customer service representative security role.
Deactivate the routing rule set.
Verify that you have the customer service manager security role.
Activate the routing rule set.
Navigate to Routing rule sets.
Edit the routing rule set.
Publish the customizations.

Answer Area

Correct Answer:

Actions

Verify that you have the customer service representative security role.

Publish the customizations.

Answer Area

Verify that you have the customer service manager security role.

Navigate to Routing rule sets.

Deactivate the routing rule set.

Edit the routing rule set.

Activate the routing rule set.

Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-service/create-rules-automatically-route-cases

QUESTION 51
HOTSPOT
You are a Dynamics 365 Customer Service administrator.
You must track issues submitted by customers.
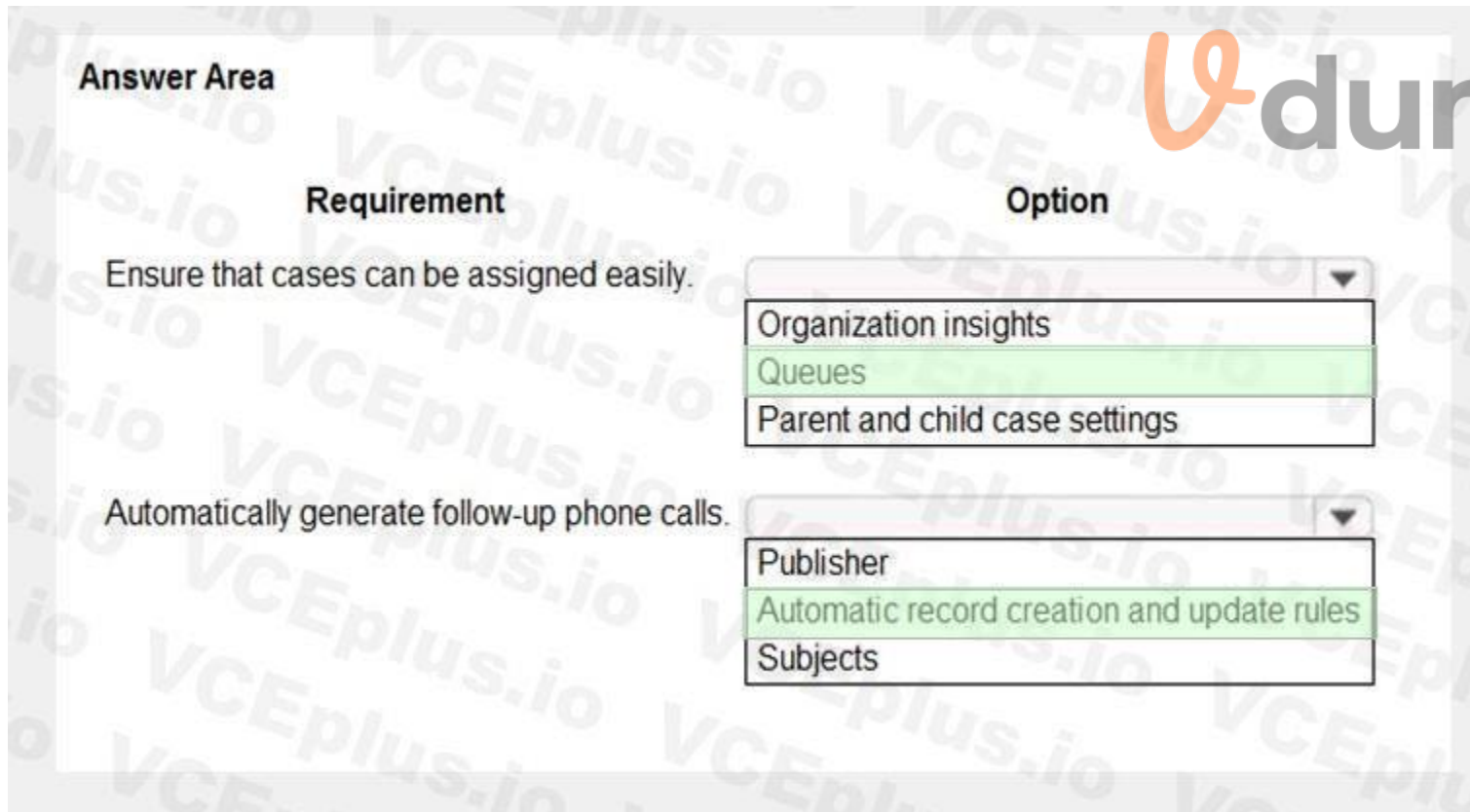You need to configure case settings for the Service Management module.
What should you configure? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Hot Area:

Answer Area

Requirement	Option
Ensure that cases can be assigned easily.	▼
	Organization insights
	Queues
	Parent and child case settings
Automatically generate follow-up phone calls.	▼
	Publisher
	Automatic record creation and update rules
	Subjects

Answer Area:

Answer Area

Requirement	Option
Ensure that cases can be assigned easily.	▼
	Organization insights
	Queues
	Parent and child case settings
Automatically generate follow-up phone calls.	▼
	Publisher
	Automatic record creation and update rules
	Subjects
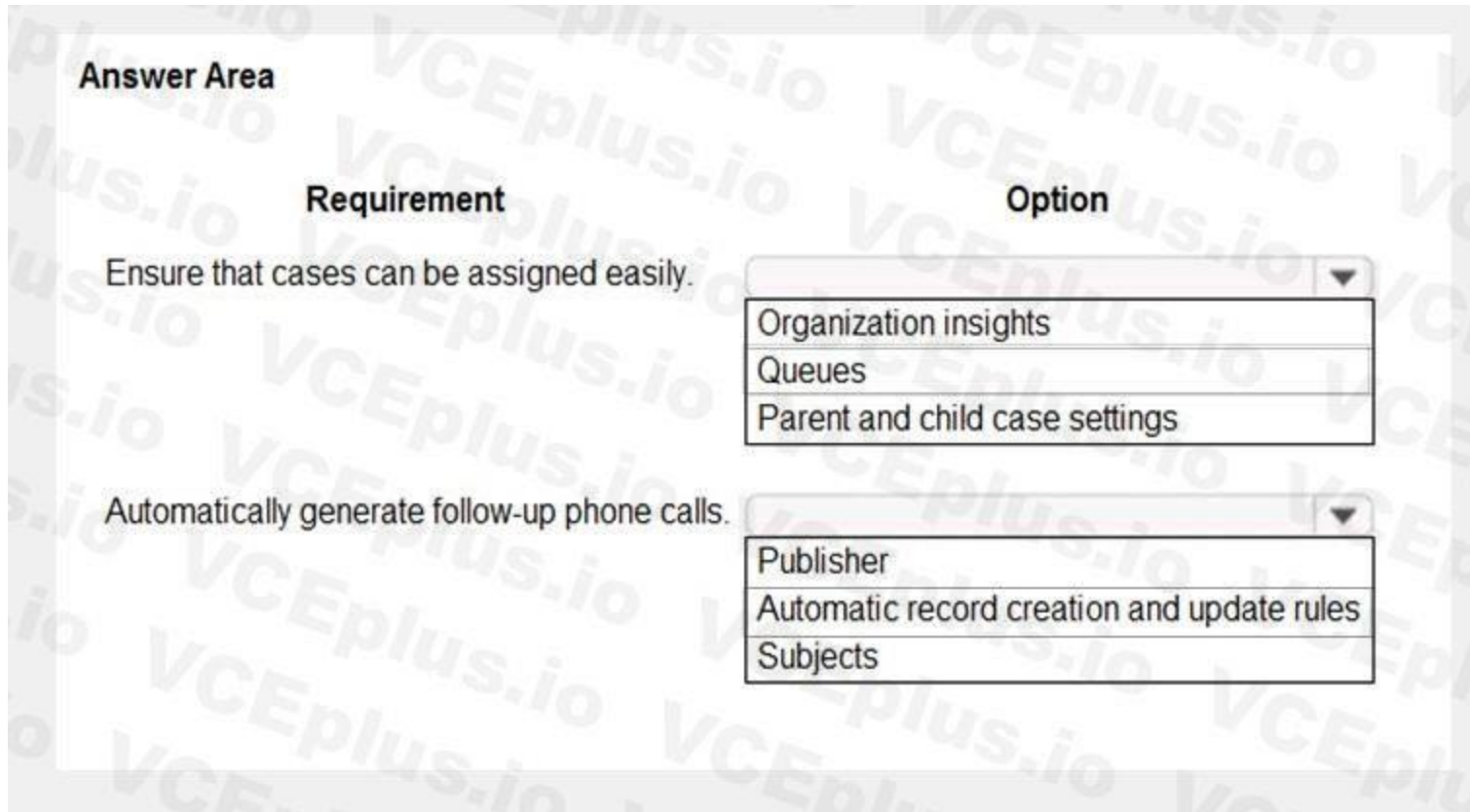
Section:
Explanation:

QUESTION 52
HOTSPOT
You are a Dynamics 365 Customer Service administrator.

Users inform you about situations in which child cases are not working correctly.

You need to configure the system to correct the issues.

What should you do in each situation? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

Answer Area

Scenario	Action
The Contact field information is not automatically propagating in the child case when opening a new case from the parent.	▼
	Add Contact to the Selected attributes for Parent and Child case settings in system management.
	Copy and paste the contact from the Parent case.
	Manually type the contact into the field.
	In your solution, create a 1:N relationship from the contact entity to case entity.
All child cases are being closed when the parent case is closed.	▼
	Change permission on the parent case so that only administrators can close it.
	Create a workflow to automatically close the parent case when all the child cases are closed.
	Change the Specified closure preference to "Don't allow parent closure until all Child cases are closed!" in system management.
	Create a routing rule to send all child cases and parent cases to the same user for assignment.
The Origin field is automatically populating into the child case.	▼
	Create a business rule to remove the information from the origin field every time a child case is created.
	Remove the Origin field from the Selected attributes for Parent and Child case settings in system management.
	Instruct users to manually remove the information in the Origin field.
	Delete and re-create the Origin field in the case form.

Answer Area:

Answer Area

Scenario	Action
The Contact field information is not automatically propagating in the child case when opening a new case from the parent.	**Add Contact to the Selected attributes for Parent and Child case settings in system management.** Copy and paste the contact from the Parent case. Manually type the contact into the field. In your solution, create a 1:N relationship from the contact entity to case entity.
All child cases are being closed when the parent case is closed.	Change permission on the parent case so that only administrators can close it. Create a workflow to automatically close the parent case when all the child cases are closed. **Change the Specified closure preference to "Don't allow parent closure until all Child cases are closed!" in system management.** Create a routing rule to send all child cases and parent cases to the same user for assignment.
The Origin field is automatically populating into the child case.	Create a business rule to remove the information from the origin field every time a child case is created. **Remove the Origin field from the Selected attributes for Parent and Child case settings in system management.** Instruct users to manually remove the information in the Origin field. Delete and re-create the Origin field in the case form.

Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-service/define-settings-parent-child-cases

QUESTION 53
HOTSPOT
You are working as a functional consultant for Dynamics 365 Customer Service. No changes have been made to security roles.
You need to ensure that customer service representatives can process cases that have service-level agreements (SLAs) and entitlements. You must grant only the minimum privileges required.
How should you configure security? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Hot Area:

Answer Area

Option	Value
Security role	Customer service representative ▼
	Customer service manager
Update holiday schedules	None ▼
	User
	Business unit
	Organization

Answer Area:

Answer Area

Option	Value
Security role	Customer service representative ▼
	Customer service manager
Update holiday schedules	None ▼
	User
	Business unit
	Organization

Section:
Explanation:
Reference:

QUESTION 54
HOTSPOT
A GOV company uses Dynamics 365 Customer Service. The company purchases Omnichannel for Customer Service.
The company wants the following requirements implemented without the need to license additional software:
The system must automatically ask questions before the chat begins.
Credit card information that a customer enters in a chat must not be visible to the agent.
You need to configure the options to meet the requirements.
Which options should you configure? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Hot Area:

Answer Area:

Answer Area

Requirement	Option
Automatic questions	▼
	Pre-chat survey
	Power Virtual Agents
	Customer Voice
	SMS channel
Credit card information	▼
	Data encryption
	Data masking rule
	Authentication settings
	Communication Panel

Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-service/configure-pre-chat-survey
https://docs.microsoft.com/en-us/dynamics365/customer-service/data-masking-settings
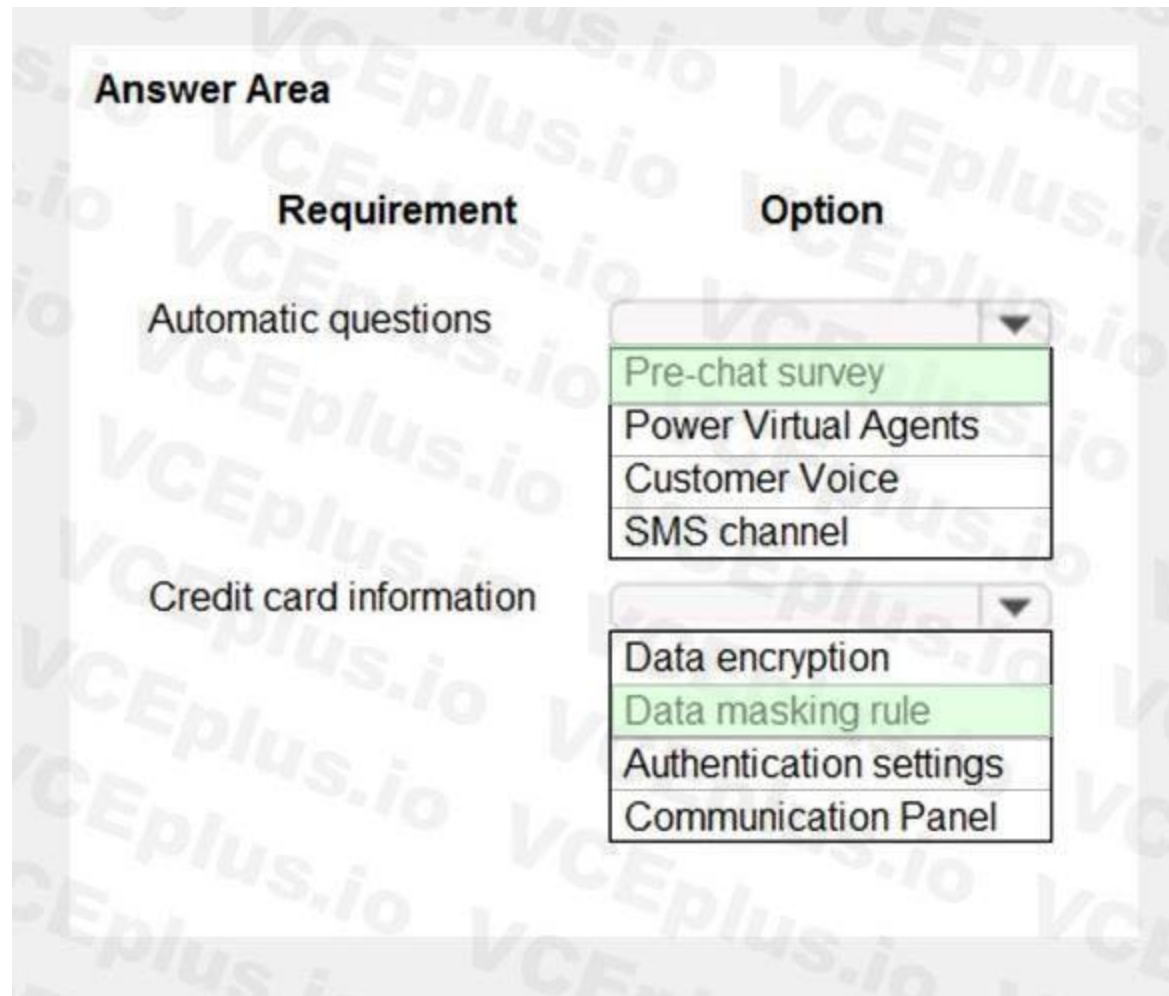
QUESTION 55
DRAG DROP
You are customizing a Dynamics 365 Customer Service implementation for a call center.
The call center wants to enable SMS as a channel for the customer service department.
You need to complete the SMS channel configuration.
Which account information should you use for each provider? To answer, drag the appropriate types of account information to the correct SMS channel provider. Each type of account information may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.
NOTE: Each correct selection is worth one point.

Select and Place:

Types of account information

Types of account information
Customer ID and Auth Token
Account SID and Auth Token
Account SID and API Key
Customer ID and API Key

Answer Area

SMS channel provider	Account information
Twilio	Account information
TeleSign	Account information

Correct Answer:

Types of account information
Customer ID and Auth Token
Customer ID and API Key

Answer Area

SMS channel provider	Account information
Twilio	Account SID and Auth Token
TeleSign	Account SID and API Key

Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-service/configure-sms-channel-twilio
https://docs.microsoft.com/en-us/dynamics365/customer-service/configure-sms-channel

QUESTION 56
DRAG DROP
You are an Omnichannel supervisor for a company.
The company wants to deploy an Omnichannel Insights dashboard.
You need to set up and monitor KPIs.
In which section is each KPI located? To answer, drag the appropriate sections to the correct KPIs. Each section may be used once, more than once, of not at all. You may need to drag the split bar between panes or scroll to view content.
NOTE: Each correct selection is worth one point.

Select and Place:

Sections

Agent
Conversation
Bot Insights
Channel

Answer Area

KPI	Section
Top Sentiment Pulse	Section
Bot Resolution Time	Section
Average Customer Sentiment Pulse	Section
Transfer Rate	Section

Correct Answer:

Sections

Answer Area

KPI	Section
Top Sentiment Pulse	Agent
Bot Resolution Time	Bot Insights
Average Customer Sentiment Pulse	Channel
Transfer Rate	Conversation

Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-service/omnichannel-insights-dashboard

QUESTION 57
HOTSPOT
You must set up the following:
A work stream must be configured to use Twitter.
The cases must automatically go to the next available sales representative.
Any existing case that comes in must be assigned automatically to the sales representative who worked on the case originally.
You need to choose the correct setting.
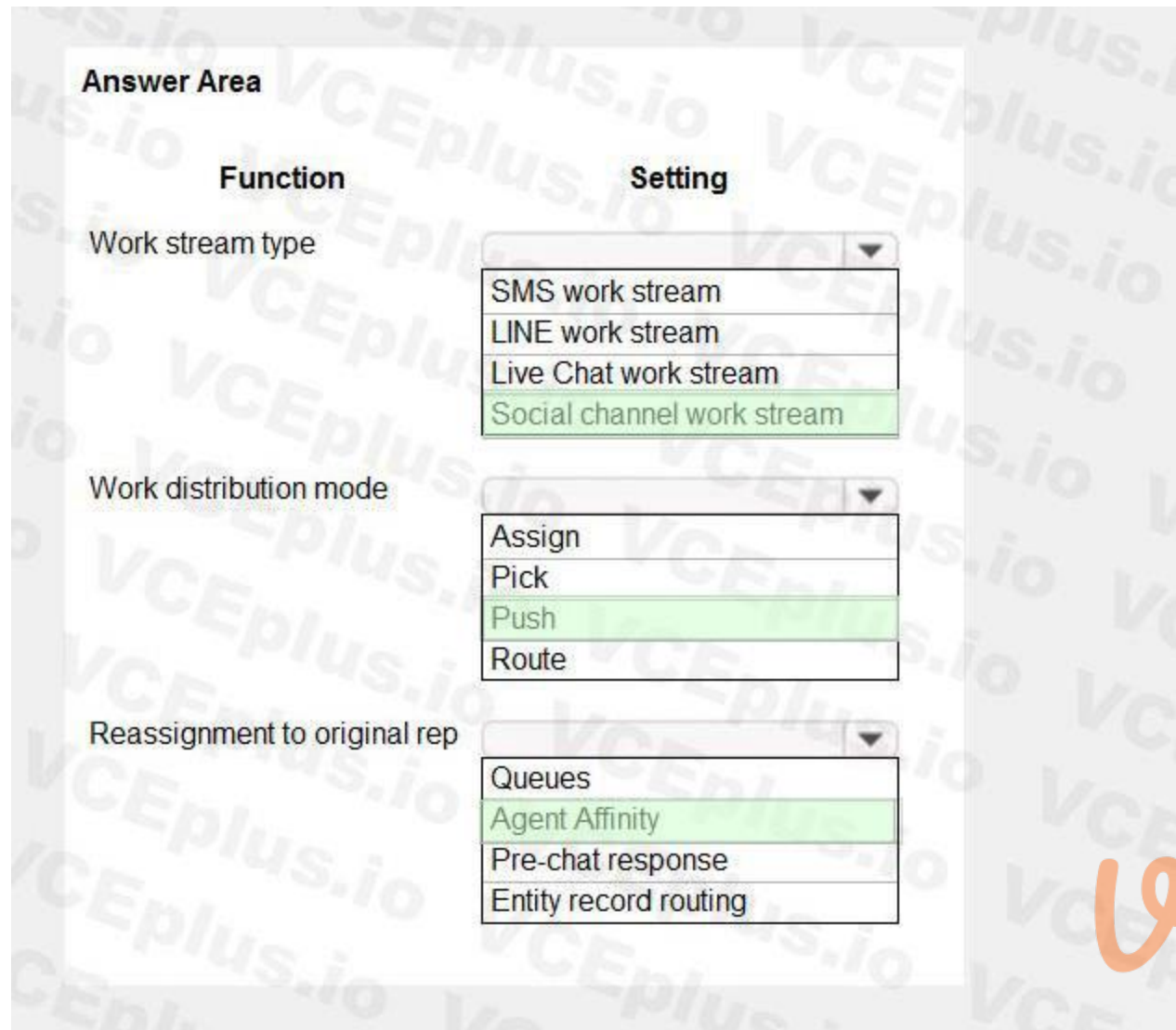Which setting should you use? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Hot Area:

Answer Area

Function	Setting
Work stream type	▼
	SMS work stream
	LINE work stream
	Live Chat work stream
	Social channel work stream
Work distribution mode	▼
	Assign
	Pick
	Push
	Route
Reassignment to original rep	▼
	Queues
	Agent Affinity
	Pre-chat response
	Entity record routing

Answer Area:

Answer Area

Function	Setting
Work stream type	▼
	SMS work stream
	LINE work stream
	Live Chat work stream
	Social channel work stream
Work distribution mode	▼
	Assign
	Pick
	Push
	Route
Reassignment to original rep	▼
	Queues
	Agent Affinity
	Pre-chat response
	Entity record routing

Section:

Explanation:

Reference:

https://docs.microsoft.com/en-us/dynamics365/customer-service/channels
https://docs.microsoft.com/en-us/dynamics365/customer-service/set-up-entity-workstream
https://docs.microsoft.com/en-us/dynamics365/customer-service/create-workstreams

QUESTION 58

HOTSPOT

You are implementing Omnichannel for Customer Service for a hospital.

Each customer service agent has a chat capacity of 200.

The implementation requirements are as follows:

Each agent can take no more than two chats at a time.

A new conversation must auto assign to an available agent.

You need to select the conversation options to meet the requirements.

Which options should you configure?

Hot Area:

Answer Area

Workstream	Conversation
Work Distribution Mode	Pull ▼
	Pull
	Queue
	Push
	Pick
Capacity	▼
	50
	100
	200
	300

Answer Area:

Answer Area

Workstream	Conversation
Work Distribution Mode	Pull
	Queue
	Push
	Pick
Capacity	50
	100
	200
	300

Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-service/unified-routing-work-distribution
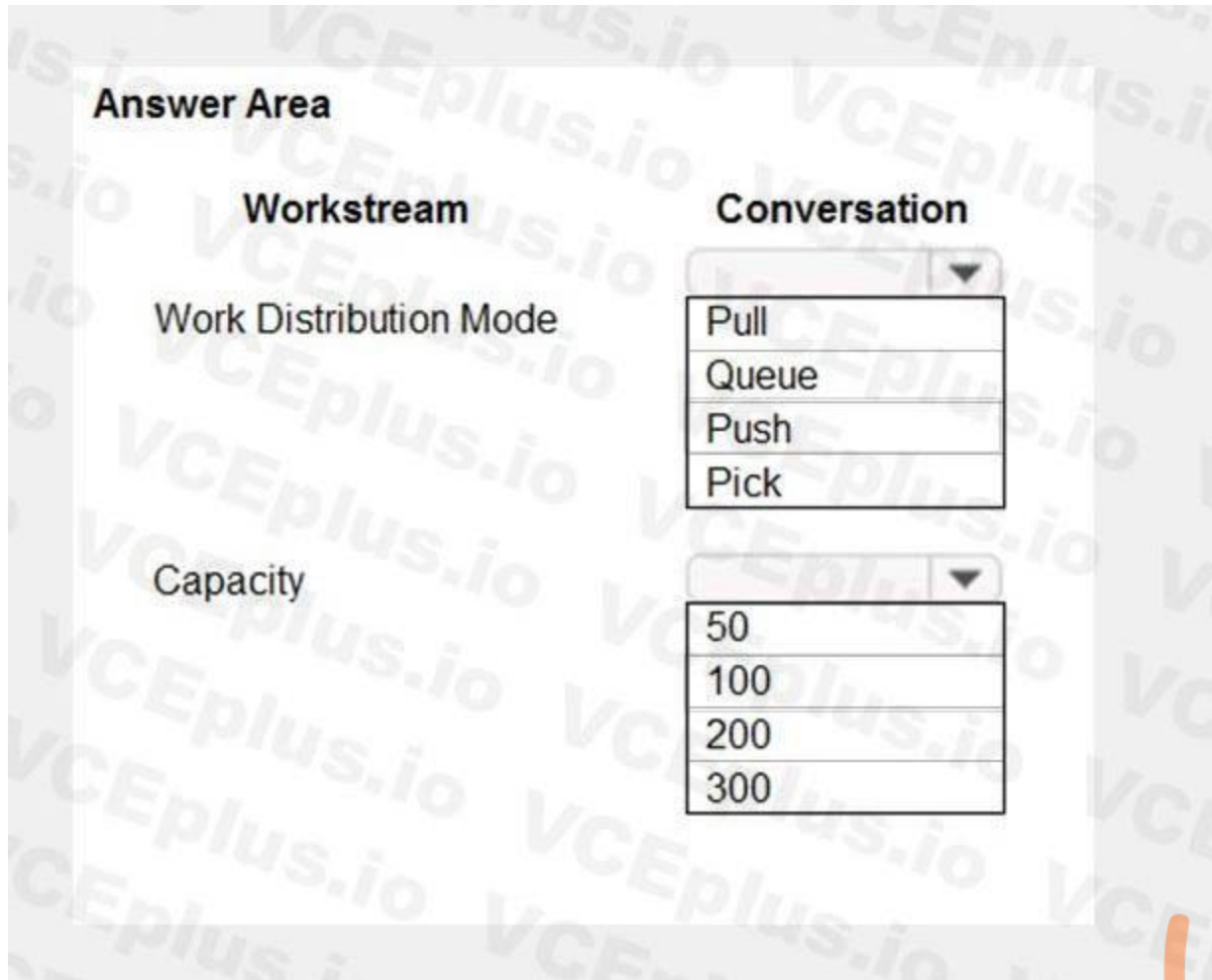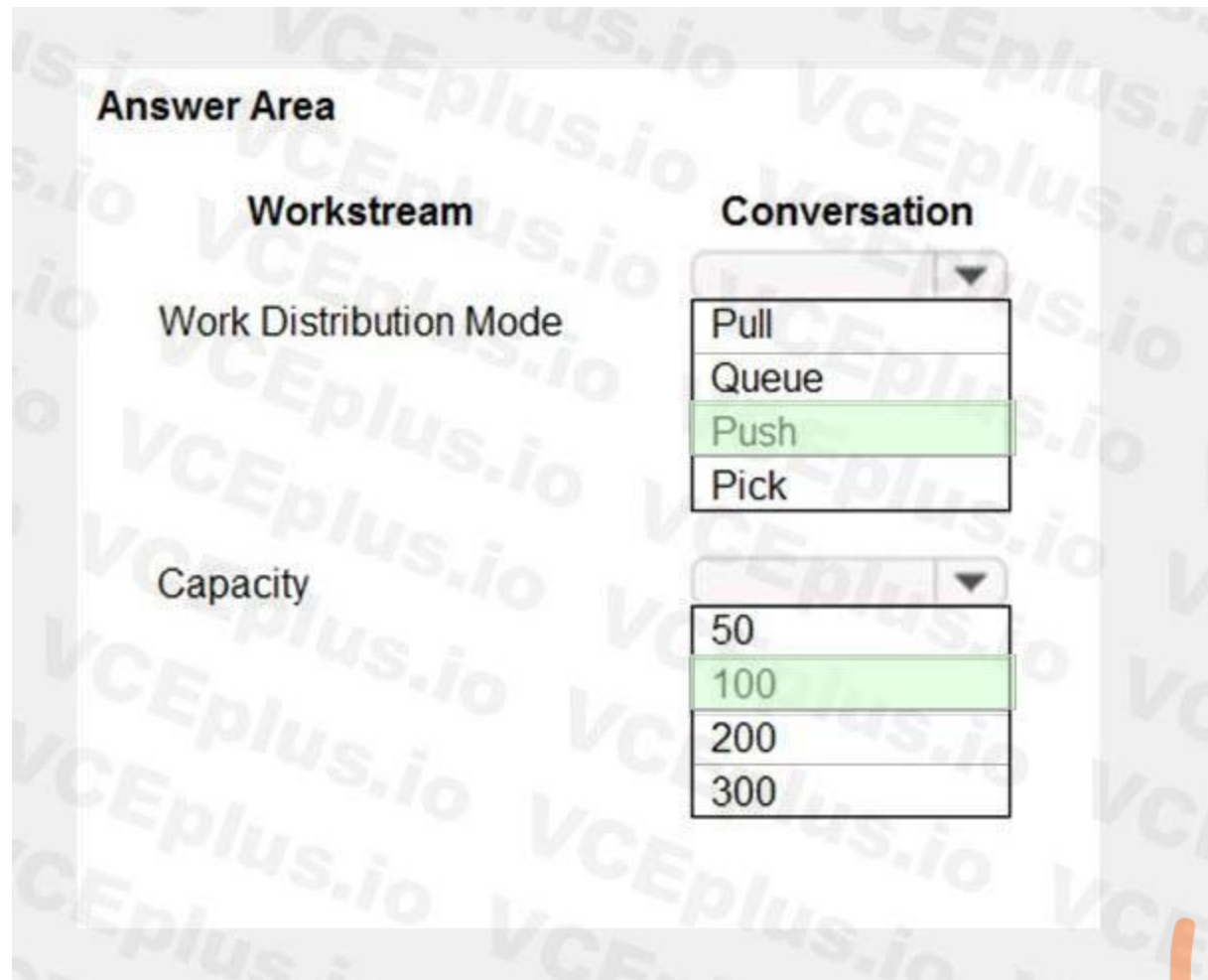
QUESTION 59
HOTSPOT
A GOV company is evaluating Dynamics 365 Customer Service Insights.
The company decides to use the sample data environment to expedite the evaluation process.
You need to recommend a dashboard.
Which dashboard should you recommend? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Hot Area:

Answer Area

Requirement	Dashboard
View the number of active, cancelled, or resolved cases per channel.	▼
	Resolutions
	KPI summary
	Customer satisfaction
View information about agent escalation handling metrics and close rates.	▼
	Topics
	New cases
	Resolutions
	KPI summary

Answer Area:

Answer Area

Requirement	Dashboard
View the number of active, cancelled, or resolved cases per channel.	▼
	Resolutions
	KPI summary
	Customer satisfaction
View information about agent escalation handling metrics and close rates.	▼
	Topics
	New cases
	Resolutions
	KPI summary

Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/ai/customer-service-insights/dashboard-kpi-summary
https://docs.microsoft.com/en-us/dynamics365/ai/customer-service-insights/dashboard-case-resolutions

QUESTION 60
DRAG DROP
You need to build a personal dashboard that displays the following charts and views:
Charts:
Number of cases by owner and priority
Products with most cases opened
Views:
Display the number of cases opened in a seven-day period
Display the number of escalated cases
Which four actions should you perform in sequence? To answer, move the appropriate actions from the list of actions to the answer area and arrange them in the correct order.

Select and Place:

Actions	Answer Area
Create the charts and views necessary to see the data requested.	
Create a two-column regular dashboard.	
Create an XML script to import graphs.	
In a solution, select Dashboards and then select New.	
Open Dashboards and select New.	
Select the graph icon to insert the charts and views needed in the sections of the dashboard.	
Select services and cases. Then select the desired views to create the dashboards.	

Correct Answer:

Actions

Create an XML script to import graphs.
In a solution, select Dashboards and then select New.
Select services and cases. Then select the desired views to create the dashboards.

Answer Area

Create the charts and views necessary to see the data requested.
Open Dashboards and select New.
Create a two-column regular dashboard.
Select the graph icon to insert the charts and views needed in the sections of the dashboard.

◀ ▶   ▲ ▼

Section:

Explanation:

Reference:

https://docs.microsoft.com/en-us/powerapps/user/track-your-progress-with-dashboard-and-charts

QUESTION 61

HOTSPOT

You are a Dynamics 365 administrator.

You need to determine which type of dashboard needs to be created for different scenarios.

Which dashboard type should you use? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

Answer Area

Scenario	Dashboard type
dashboard for Tier 1 customer service reps handling many support cases at the same time	multi-stream dashboard only / single-stream dashboard only / multi-stream or single-stream dashboard
one dashboard but more than one entity	multi-stream dashboard only / single-stream dashboard only / multi-stream or single-stream dashboard
dashboard that can easily switch from standard view to tile view	multi-stream dashboard only / single-stream dashboard only / multi-stream or single-stream dashboard
dashboard to which Global filters and Time Frame filters can be applied	multi-stream dashboard only / single-stream dashboard only / multi-stream or single-stream dashboard

Answer Area:

Answer Area

Scenario	Dashboard type
dashboard for Tier 1 customer service reps handling many support cases at the same time	**multi-stream dashboard only** ▼ multi-stream dashboard only single-stream dashboard only multi-stream or single-stream dashboard
one dashboard but more than one entity	**multi-stream dashboard only** ▼ multi-stream dashboard only single-stream dashboard only multi-stream or single-stream dashboard
dashboard that can easily switch from standard view to tile view	**multi-stream dashboard only** ▼ multi-stream dashboard only single-stream dashboard only multi-stream or single-stream dashboard
dashboard to which Global filters and Time Frame filters can be applied	▼ multi-stream dashboard only single-stream dashboard only **multi-stream or single-stream dashboard**

Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-service/customer-service-hub-user-guide-dashboard

QUESTION 62
HOTSPOT
A GOV company uses Dynamics 365 Customer Service. The company installs Dynamics 365 Customer Service Insights.
The company wants to use dashboards to report phone calls and emails to monitor the productivity of representatives.
You need to perform the configuration.
Which configuration should you use? To answer, select the appropriate configurations in the answer area.
NOTE: Each correct selection is worth one point.

Hot Area:

Answer Area:

Section:
Explanation:
Box 1: Go to the Dynamics 365 Customer Service URL and choose the Dynamics 365 Customer Service Insights dashboard.
Customer Service Insights is now embedded in Dynamics 365 Customer Service. After it is enabled, this experience allows you to start seeing historical analytics directly within the Customer Service environment. Several reports and dashboards can be viewed by your management team.
Box 2: Channel
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-service/introduction-customer-serviceanalytics

QUESTION 63
HOTSPOT
You are a help desk support representative using Dynamics 365 Customer Service Hub case management with limited permissions.
You need to create a personal chart that meets the following requirements:
Show the number of open cases assigned to you for each customer.
Ensure that specific team members can view the chart and view any changes as you update the chart.
Which options should you use? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Hot Area:

Answer Area:

Requirement	Option
Show the total number of open cases.	**CountAll** / Sum / Max / Min
Allow team members to see the chart you created.	Have the system administrator sign in and share the chart with users. / Share the personal chart and add the users giving each one read permissions. / Assign the chart to the system administrator and have him save this to a system chart.

Section:
Explanation:
Box 1: Countall
COUNT (Azure Stream Analytics) returns the number of items in a group. COUNT always returns a bigint data type value.
Syntax:
-- Aggregate Function Syntax
COUNT ({ [[ALL | DISTINCT] expression] | * })
Arguments:
ALL - Applies the aggregate function to all values. ALL is the default.
Box 2: Share the personal chart and add the user giving each one read permission
Reference:
https://docs.microsoft.com/en-us/stream-analytics-query/count-azure-stream-analytics

QUESTION 64
DRAG DROP
A GOV company creates a single-page Power BI visualization to show how a Power Virtual Agents chatbot is performing.
Users must be able to navigate to the charts from anywhere within the Customer Service workspace.
You need to add the Power BI information to the Customer Service workspace app.
Which five actions should you perform in sequence? To answer, move the appropriate actions from the list of actions to the answer area and arrange them in the correct order.

Select and Place:

Actions

Select **Power BI dashboard** for Type. Enter the Power BI workspace and Power BI report values.
Export the solution, edit the customizations.xml file, and add XML code for the Power BI workspace ID and report ID.
Edit the sitemap, add a new subarea, and add the Power BI page information to the properties of the subarea.
Navigate to the maker portal and create a new solution.
Select **Add Existing** and then select **Dashboard**.
Select **Power BI report** for Type. Enter the Power BI workspace and Power BI report values.
Select **New** and then create a Power BI embedded dashboard.
Save and publish the customization.

Answer area

Correct Answer:

Actions

Select **Power BI dashboard** for Type. Enter the Power BI workspace and Power BI report values.
Export the solution, edit the customizations.xml file, and add XML code for the Power BI workspace ID and report ID.
Select **New** and then create a Power BI embedded dashboard.

Answer area

Navigate to the maker portal and create a new solution.
Select **Add Existing** and then select **Dashboard**.
Select **Power BI report** for Type. Enter the Power BI workspace and Power BI report values.
Edit the sitemap, add a new subarea, and add the Power BI page information to the properties of the subarea.
Save and publish the customization.

Section:
Explanation:
Step 1: Navigate to the maker portal and create a new solution.
Step 2: Select Add Existing and then select Dasbhoard.
Step 3: Select Power BI Report for type. Enter the Power BI workspace and Power BI report values.
Note: Get the embedding parameter values
To embed your content, you need to obtain certain parameter values. The table below shows the required values, and indicates if they're applicable to the service principal authentication method, the master user authentication method, or both.
Before you embed your content, make sure you have all the values listed below. Some of the values will differ, depending on the authentication method you're using.

Parameter	Service principal	Master user
Client ID	✓	✓
Workspace ID	✓	✓
Report ID	✓	✓
Client secret	✓	✕
Tenant ID	✓	✕
Power BI username	✕	✓
Power BI password	✕	✓

Step 4: Edit the sitemap, add a new subarea, and add the Power BI page information to the properties of the subarea Edit the default site map Your environment comes with a default site map. This site map is supported for both custom business apps and Dynamics 365 for Outlook.
In the Dynamics 365 - custom app, go to Settings > Customizations.
Select Customize the System.
In the solution window, under Components, select Client Extensions.
Double-click to select the site map that has the display name Site Map and is in a Managed state. You can also select the site map, and then on the toolbar, select Edit.
The site map opens in the site map designer.
Add an area to the site map.
Add a group to the site map.
Add a subarea to a group in the site map.
Select Save.
Select Publish.
Step 5: Save and publish the customization
Reference:
https://docs.microsoft.com/en-us/power-bi/developer/embedded/embed-sample-for-customers

QUESTION 65
HOTSPOT
A client wants to use the knowledge base in Dynamics 365 Customer Service.
You need to identify the state of a knowledge base article when an event occurs.
What are the states of the articles? To answer, select the appropriate options in the answer area.
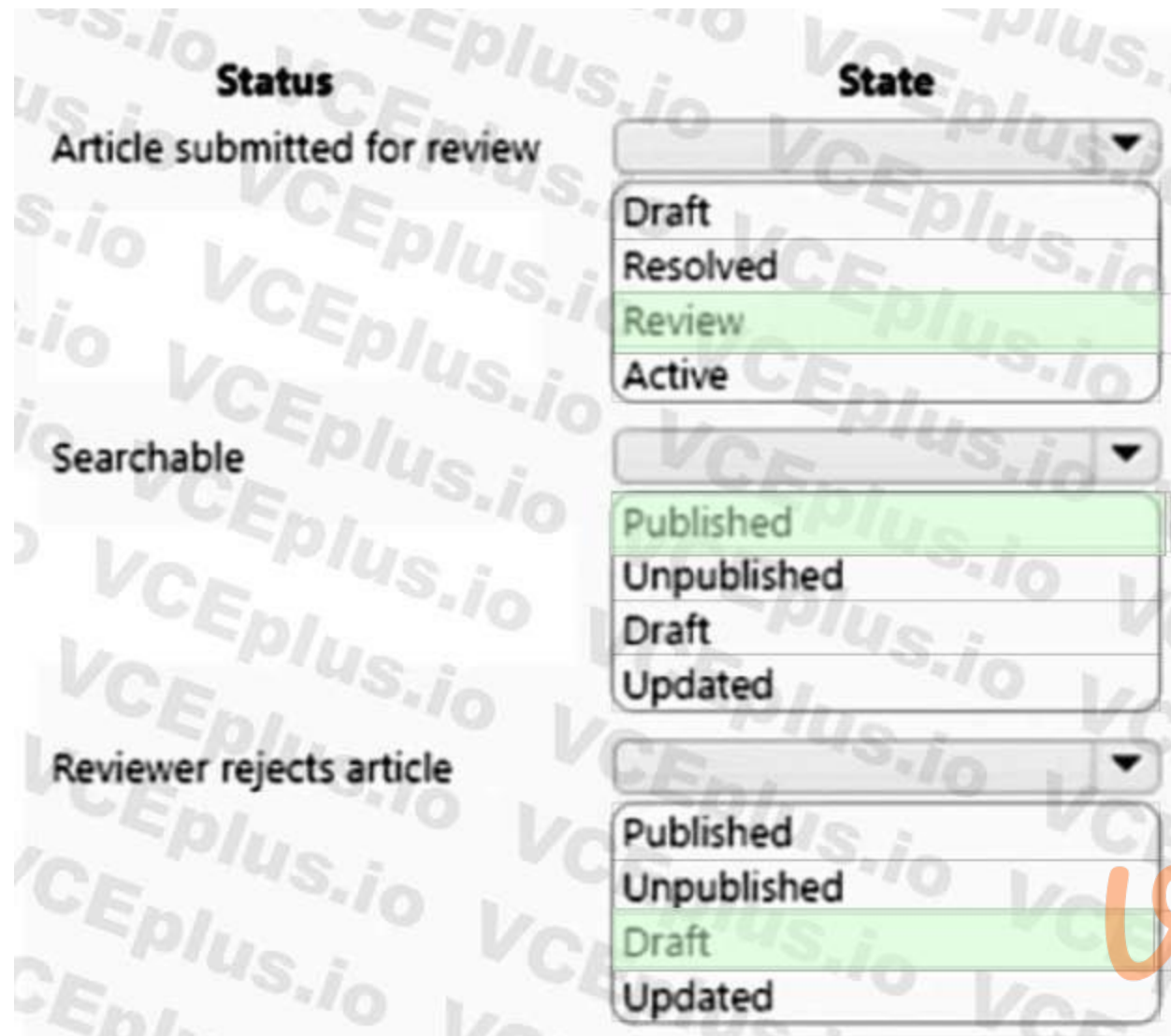NOTE: Each correct selection is worth one point.

Hot Area:

Status	State
Article submitted for review	▼
	Draft
	Resolved
	Review
	Active
Searchable	▼
	Published
	Unpublished
	Draft
	Updated
Reviewer rejects article	▼
	Published
	Unpublished
	Draft
	Updated

Answer Area:

Status	State
Article submitted for review	▼
	Draft
	Resolved
	Review
	Active
Searchable	▼
	Published
	Unpublished
	Draft
	Updated
Reviewer rejects article	▼
	Published
	Unpublished
	Draft
	Updated

Section:
Explanation:
Box 1: Review
Review - The draft version of the article is sent to reviewers to approve or reject.
Mark a knowledge article for review
To ensure that the content you've created is accurate, have someone review it.
You can mark an article for review or directly assign it to a specific person or queue. When you mark an article for review, it starts appearing in the knowledge manager's dashboard. The knowledge manager can then assign the article to specific team members or a queue for review.
Box 2: Published
When you approve the content of an article, it means that the content is ready to be consumed by other customer service reps, and also ready to be published.
On the Business process bar, in the Review stage, in the Review field, select Approve.
The article is now ready to be published.
Box 3: Draft
Draft - The article is in the process of being created.
Note: A versioned knowledge article in the Draft state can be modified only by the author or reviser with the contribute access to the knowledge base, owner of a knowledge base, users with the admin and knowledge_admin role, and ownership group members, if ownership group is added to the article.
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-service/customer-service-hub-user-guideknowledge-article

QUESTION 66
HOTSPOT
A customer service manager needs a new business process flow to manage support for a product rollout for bicycles. There are two bicycle models: standard and high performance.

Support representatives must be able to:

Specify the model of the bicycle.

Capture comments from customer support issues if the bicycle is the high-performance model.

You need to create the business process flow.

What should you configure for each requirement? To answer, select the appropriate options in the answer area.

Hot Area:

Requirement	Component
Specify the model of the bicycle.	▼
	Categories only
	Categories and Subjects
	Subjects only
Capture comments from customer support issues if the bicycle is the high-performance model.	▼
	Categories only
	Categories and Subjects
	Subjects only

Answer Area:

Requirement	Component
Specify the model of the bicycle.	▼
	Categories only
	Categories and Subjects
	Subjects only
Capture comments from customer support issues if the bicycle is the high-performance model.	▼
	Categories only
	Categories and Subjects
	Subjects only

Section:

Explanation:

Box 1: Categories only

Box 2: Categories and Subjects

Note:

* Using the Categories entity, you can create hierarchical categorical data to help group records.

Categorizing entity records in Dynamics 365 Customer Service helps you tag the records so that you can easily search them. Use the entity to create and manage a logical structure of categories in Dynamics 365 Customer Service, and then associate entity records to one or more categories.

Categories are useful for reporting, sorting, segmenting, and categorization of records.

* The customer engagement apps (Dynamics 365 Sales, Dynamics 365 Customer Service, Dynamics 365 Field Service, Dynamics 365 Marketing, and Dynamics 365 Project Service Automation), include a subject organizational structure that lets you mark and categorize service cases, knowledge base articles, products, and sales literature. By using the subject hierarchy, you can classify service cases to quickly provide service to your customer. You can also provide the appropriate sales literature. You'll also be able to better understand gaps in your sales literature, evaluate service quality by subject area, and improve reporting on the performance of your products.

Reference:

https://docs.microsoft.com/en-us/dynamics365/customer-service/create-manage-categories

https://docs.microsoft.com/en-us/power-platform/admin/define-subjects-categorize-casesproducts-articles

QUESTION 67

DRAG DROP

A GOV company deploys Dynamics 365 Customer Service.

A service manager requires a new classification ruleset for Bronze-type customers. The Bronze type customers require an answer within five hours.

You need to create the classification ruleset.

In which order should you perform the actions? To answer, move all actions from the list of actions to the answer area and arrange them in the correct order.

Select and Place:

Actions	Answer area
Create a condition for the Bronze rule.	
Create a rule named **5-hour response** from the decisions list.	
Create a new manual rule named **Bronze**.	
Create a new ruleset in a workstream.	
Create a demand rule for the Bronze rule.	

Correct Answer:

Actions	Answer area
	Create a new ruleset in a workstream.
	Create a new manual rule named **Bronze**
	Create a condition for the Bronze rule.
	Create a rule named **5-hour response** from the decisions list.
	Create a demand rule for the Bronze rule.

Section:
Explanation:

Create a new ruleset in a workstream.

Create a new manual rule named Bronze.

Create a condition for the Bronze rule.

Create a rule named 5-hour response from the decision list.

Create a demand rule for the Bronze rule.

https://docs.microsoft.com/en-us/dynamics365/customer-service/configure-work-classification

QUESTION 68
HOTSPOT
A GOV company uses Dynamics 365 Customer Voice.

The company requires the following for a survey:

The survey must be sent automatically each time a salesperson visits a customer and closes the appointment.

If a survey satisfaction score is negative, an activity must be created for the salesperson.

You need to configure the survey.

What should you do? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

Answer Area:

Section:
Explanation:
Box 1: Create a Power Automate flow
After creating a survey, you can send it to respondents based on a business trigger—resolution of a case or fulfillment of an order, for example. You can either select a built-in template or create a flow from scratch by using Power
Automate.
Box 2: Create an alert rule Dynamics 365 Customer Voice includes built-in follow-up management to ensure you follow up to your customer feedback in a timely manner. Each customer satisfaction metric includes support for a real-time alert to notify business users upon receiving customer feedback within the specified alert range. Business users can manage and resolve alerts with follow-up action notes using the built-in alert management dashboard.
Alerts are the follow-up activities that are created based on the defined alert rules. Alert rules are defined on satisfaction metrics. Alerts are created based on the values of satisfaction metrics in survey responses.
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-voice/send-survey-flow
https://docs.microsoft.com/en-us/dynamics365-release-plan/2020wave2/customervoice/dynamics365-customer-voice/close-feedback-loop-through-alerting-follow-up-management
https://docs.microsoft.com/en-us/dynamics365/customer-voice/alerts

QUESTION 69
DRAG DROP

A GOV company implements Dynamics 365 Customer Voice. The company sends out customer satisfaction surveys. The service team creates one survey from a blank project and others from a predefined project template.
When the company receives all the survey responses, a member of the service team must analyze the results. The member must calculate satisfaction scores to help the service manager identify required efficiency changes for the department.
You need to determine which type of satisfaction metrics to use.
Which metrics should you use? To answer, drag the appropriate metrics to the correct scores. Each metric may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.
NOTE: Each correct selection is worth one point.

Select and Place:

Correct Answer:

Section:
Explanation:
Box 1: Net Promoter Score
Net Promoter Score (NPS): NPS is a metric used to measure customer loyalty. The score is calculated from the NPS-type question by using a scale from 0 through 10. The respondents are grouped as follows:
Detractors are those who respond with a score from 0 through 6.
Passives are those who respond with a score of 7 or 8.
Promoters are those who respond with a score of 9 or 10.
NPS is calculated by subtracting the percentage of detractors from the percentage of promoters. The score is a number that can range from –100 to 100.
Box 2: Customer Satisfaction Score
Customer Satisfaction (CSAT): CSAT is a metric used to measure the level of satisfaction customers have with a product or a service. CSAT is measured by responses to rating-type questions. The CSAT score is calculated on a scale of 1 to 5. If you create a question on a scale other than 1 to 5, the CSAT score is normalized as per the 1 to 5 scale. This helps in comparing various CSAT scores.
Incorrect:
Sentiment: Sentiment is a metric used to identify customer sentiment toward a product or a service.
Sentiment groups the responses to a text-based question as positive, negative, or neutral.
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-voice/satisfaction-metrics

QUESTION 70
DRAG DROP
You are a Dynamics 365 administrator.
You want to set up a child/parent relationship for cases so that the child case inherits different fields from the parent case.
You need to set up the appropriate child/parent relationship.
Which three actions should you perform in sequence? To answer, move the appropriate actions from the list of actions to the answer area and arrange them in the correct order.

Select and Place:

Correct Answer:

Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-service/define-settings-parent-child-cases

QUESTION 71
HOTSPOT
You are modifying the phone-to-case process in Dynamics 365 Customer Service. You create a flow by using PowerApps as shown in the exhibit. (Click the Exhibit tab.)
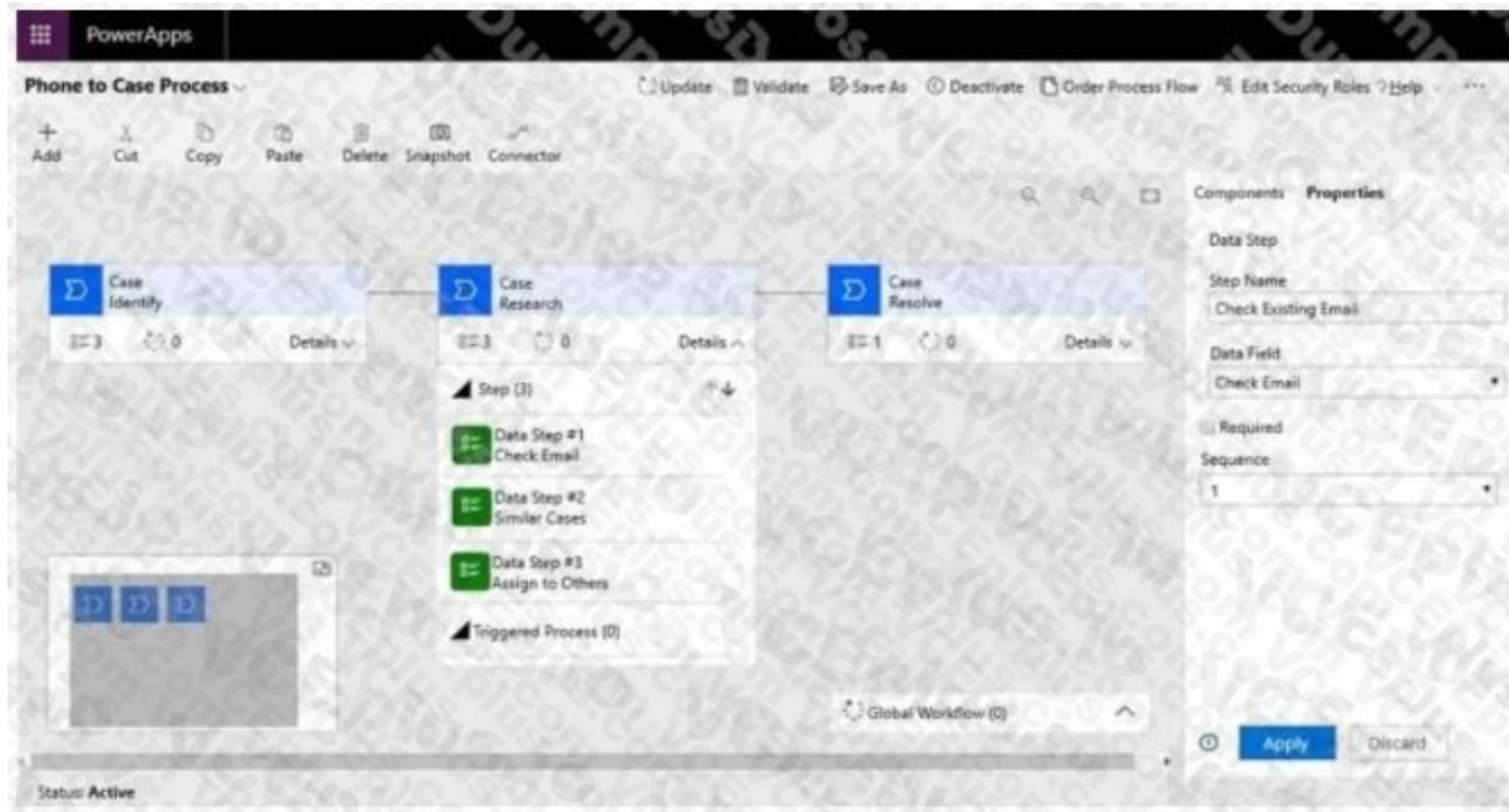
You must modify the business process flow to include the check-email step at the beginning of the research stage.

Use the drop-down menus to select the answer choice that answers each question based on the information presented in the graphic.

NOTE: Each correct selection is worth one point.

Hot Area:

Answer Area

Question	Answer Choices
You need to change the step name from **Check Email** to **Check Existing Email** and ensure that the change displays in the process. What should you select?	▼ Apply Add Validate
Where can you configure the Check email field?	▼ Properties Add Components
Which type of process is this?	▼ Business process flow Workflow Dialog Microsoft Flow

Answer Area:

Answer Area

Question	Answer Choices
You need to change the step name from **Check Email** to **Check Existing Email** and ensure that the change displays in the process. What should you select?	▼ **Apply** / Add / Validate
Where can you configure the Check email field?	▼ **Properties** / Add / Components
Which type of process is this?	▼ **Business process flow** / Workflow / Dialog / Microsoft Flow

Section:

Explanation:

Reference: https://docs.microsoft.com/en-us/power-automate/create-business-process- flow?context=/dynamics365/context/sales-context#edit-a-business-process-flow

QUESTION 72
You are a Dynamics 365 for Customer Service administrator.
Your company provides standard support contracts for 20 hours of email support. Phone is offered as a premium service in allotments of 10 incidents.
You need to set up an entitlement template for the standard support.
What should you configure?

A. Set the value of the Total terms field for an entitlement to 20.
    Set the entitlement channel option to Phone.
    Set the value of the Total terms value to 20.

B. Set the value of the Total terms field for an entitlement to 20.
    Set the entitlement channel option to Email. Set the value of the Total terms field to 20.

C. Set the value of the Total terms field for an entitlement to 20.
    Set the entitlement channel option to Email.
    Set the value of the Total terms field to 10.
    Add the Phone option. Set the value of the Total Terms field to 10.

D. Set the value of the Total terms field for an entitlement to 20.
    Set the entitlement channel option to Email. Set the value of the Total terms field to 0.
    Add the Phone option.
    Set the value of the Total Terms field to 10.

Correct Answer: B
Section:

QUESTION 73
You are using Dynamics 365 for Customer Service.
You need to create the entitlements for your customers.
What should you do?

A. Create queues for each channel.

B. Create an entity for each channel and configure the relationship with the entitlement.

C. Configure entitlement channels.

D. Configure routing rules.

Correct Answer: C
Section:

QUESTION 74
You are a customer service manager for A P-L-U-S company using Dynamics 365 for Customer Service.
You need to set up queues to manage support. You assign a team to each queue.
What type of queue should you configure?

A. Personal

B. Private

C. Business unit

D. Public

Correct Answer: B
Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-engagement/customer-service/set-upqueuesmanage-activities-cases

QUESTION 75
Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.
After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.
Your company provides clients with Dynamics 365 for Customer Service Voice of the Customer employee satisfaction surveys. The company has a standardized set of survey questions named Satisfaction Survey.
You need to customize the survey for each client.
Solution: Clone the satisfaction survey and customize the questions.
Does the solution meet the goal?

A. Yes

B. No

Correct Answer: A
Section:
Explanation:
Reference:

https://docs.microsoft.com/en-us/dynamics365/customer-engagement/voice-of-customer/designbasicsurvey#clone-or-import-an-existing-survey

QUESTION 76
Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.
After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.
Your company provides clients with Dynamics 365 for Customer Service Voice of the Customer employee satisfaction surveys. The company has a standardized set of survey questions named Satisfaction Survey.
You need to customize the survey for each client.
Solution: Open the source survey and the new survey. Drag the questions from the source survey to the new survey. Then customize the questions.
Does the solution meet the goal?

A. Yes

B. No

Correct Answer: B
Section:

QUESTION 77
Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.
After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.
Your company provides clients with Dynamics 365 for Customer Service Voice of the Customer employee satisfaction surveys. The company has a standardized set of survey questions named Satisfaction Survey.
You need to customize the survey for each client.
Solution: Create custom question types. Add the custom question types to a new survey. Customize the questions.
Does the solution meet the goal?

A. Yes

B. No

Correct Answer: B
Section:

QUESTION 78
Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.
After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.
You are implementing Dynamics 365 Customer Service for a call center. There are separate queues for level1 and level2.
You need to set up the queues to meet the following requirements:
Users must have their own queues that no one else can access.
Users must not be able to view each other's queue.
Users must be able to work from the support queue.
Solution:
Set up each user queue to be private.
Set up level1 and level2 queues to be private and add applicable members.
Set up the support queue to be public.
Does the solution meet the goal?

A. Yes

B. No

Correct Answer: B
Section:
Explanation:
The level1 and level2 queues must be public so the users can access them.
Note: Public: All users can see and access these queues, depending on their security role.
Users pick items from the queue. The items that a user picks are then moved to that user's personal queue.
Private: Access to these queues is assigned to specific users. (Members are defined on the queue record.)
Users pick items from the queue. The items that a user picks are then moved to that user's personal queue.
Also:
In Customer Service, you can create two types of queues:
Private queues: Create with limited set of members to help those members easily view the queue items in that queue. Private queues streamline queue items for the members of that queue only and help to remove clutter from other user's views.
Public queues: Create to let everyone in the organization view the queue and all of its items.
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-service/set-up-queues-manage-activitiescases

QUESTION 79
DRAG DROP
You are setting up Omnichannel for Customer Service.
You need to automate the following tasks to make it easier and quicker for representatives to assist customers:
Establish a one-step process to send a predefined email to customers once a representative is done helping them.
Ensure that representatives ask predefined questions to identify a customer before troubleshooting a case.
Have chatbots available to help make recommendations in typed conversations.
Which tools should you use? To answer, drag the appropriate tools to the correct requirements. Each tool may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.

Select and Place:

Tools	Answer Area	
Resources		
Security roles	**Requirement**	**Tool**
Working hours	Send predefined emails.	
Business closures	Ask predefined questions.	
	Include recommendation chatbots.	

Correct Answer:

Tools

| Resources |
| Security roles |
| Working hours |
| Business closures |

Answer Area

Requirement	Tool
Send predefined emails.	Resources
Ask predefined questions.	Security roles
Include recommendation chatbots.	Working hours

Section:
Explanation:

QUESTION 80
HOTSPOT
You are implementing Omnichannel for Customer Service for a company.
The company has the following requirements:
The Knowledgebase article search tab must open when a new chat conversation begins.
The Chat Session template must be in expanded mode for the agents.
You need to complete the implementation to meet the requirements.
Which configuration should you use for each requirement? To answer, select the appropriate options in the answer area.

Hot Area:

Requirement	Configuration
Communication panel mode for the chat session	[dropdown]
	Hidden
	Minimized
	Docked
Application type for the knowledgebase articles	[dropdown]
	Entity search
	Web resource
	Custom control

Answer Area:

Requirement	Configuration
Communication panel mode for the chat session	▼
	Hidden
	Minimized
	Docked
Application type for the knowledgebase articles	▼
	Entity search
	Web resource
	Custom control
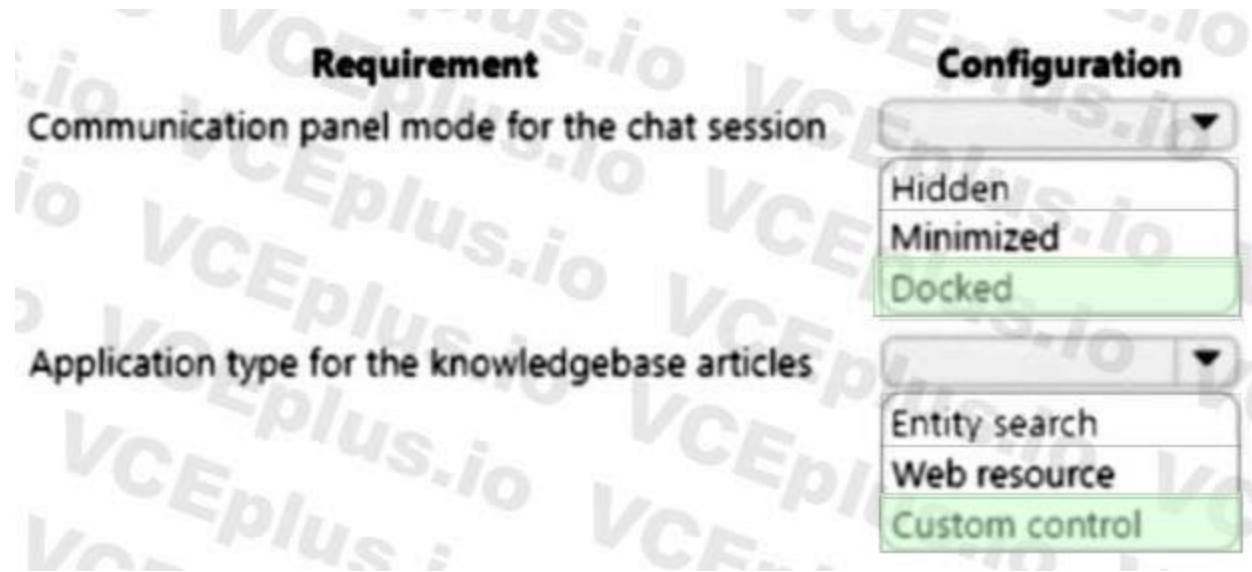
Section:
Explanation:
Box 1: Docked
Communication panel mode - Select the default mode of the panel when a session is started. Choose one of the following:
Docked: The panel will be in expanded mode.
Minimized: The panel will be in minimized mode.
Hidden: The panel will be hidden.
Box 2: Entity Search
Manage application tab templates, Search, The following parameters are available for the entity search page type.
searchType - Define to use Relevance search or Categorized search.
searchText - Define the string you want to search.
Reference:
https://docs.microsoft.com/en-us/dynamics365/app-profile-manager/session-templates
https://docs.microsoft.com/en-us/dynamics365/app-profile-manager/application-tab-templates

QUESTION 81
You manage a Dynamics 365 for Customer Service environment. You create and activate a routing rule.
You need to modify the routing rule to a target a queue instead of a user. You navigate to routing rule sets.
What should you do first?

A. Use Lookup to specify the Add to queue value.

B. Select Edit to the command bar.

C. Toggle the radio button for Route from user/team to queue.

D. Deactivate the routing rule.

Correct Answer: D
Section:

QUESTION 82
You manage a Dynamics 365 for Customer Service environment.
The entitlement for a customer ended last month. The customer must renew the entitlement and use the same parameters as the expired entitlement.
You need to create the entitlement for the customer.
What should you do?

A. Create a new template with the dates and terms. Activate the template.

B. Delete the old entitlement. Create a new entitlement template.

C. Add the new end date to the current entitlement and set new terms. Activate the entitlement.

D. Make a copy of the old entitlement. Activate the copy.

E. In the old entitlement, zero out the remaining terms and the total terms. Activate the entitlement.

Correct Answer: C
Section:

QUESTION 83
You are using Dynamics 365 for Customer Service.
You need to automate the process of adding cases to a queue.
What should you do?

A. Use routing rules

B. Use the convert activities functionality with cases

C. Use the add to queue button on a case

D. Use the Assign button on a case

Correct Answer: A
Section:

QUESTION 84
HOTSPOT
You need to set the schedule to meet requirements for appointments.
How should you configure the settings? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Hot Area:

Answer Area

Preference	Setting
Interval	▼
	30 minutes
	1 hour
	90 minutes
	15 hours
Start time	▼
	8:00 A.M.
	8:30 A.M.
	12:00 A.M.
	12:30 A.M.
End time	▼
	8:00 A.M.
	8:30 A.M.
	12:00 A.M.
	12:30 A.M.
Results per interval	▼
	3
	8
	12
	Auto-schedule

Answer Area:

Answer Area

Preference	Setting
Interval	▼
	30 minutes
	1 hour
	90 minutes
	15 hours
Start time	▼
	8:00 A.M.
	8:30 A.M.
	12:00 A.M.
	12:30 A.M.
End time	▼
	8:00 A.M.
	8:30 A.M.
	12:00 A.M.
	12:30 A.M.
Results per interval	▼
	3
	8
	12
	Auto-schedule

Section:
Explanation:

QUESTION 85
A company uses Dynamics 365 Customer Sen/ice.
Agents note that when a customer calls, they are unable to view all activities associated with the customer and the customer's company.
Agents must be able to view tasks, appointments, phone calls, emails, notes, and system and user posts.
You create a model-driven app to display the information.

You need to configure the model-driven app main form.
Which two actions should you perform? Each correct answer presents part of the solution.
NOTE: Each correct selection is worth one point.

A. Set the Regarding column to the Account table.

B. Use a Timeline control.

C. Set the Regarding column to the Contact table.

D. Use a Quick view control.

E. Use a card form.

Correct Answer: B, E
Section:

QUESTION 86
You are a system administrator for Dynamics 365 Customer Service. In the default account form, you create an escalation column as a choice of Yes/No.
The main account form must have a column of escalation paths. The column must be hidden if the escalation column is set to No. If the escalation column is set to Yes, the escalation path column must be displayed and filled out.
You need to configure the form.
What should you configure?

A. Business process flow

B. Business rule

C. Power Bi dashboard

D. Power Automate flow

Correct Answer: B
Section:

QUESTION 87
A company uses Dynamics 365 Customer Sen/ice.
A customer service supervisor must create canvas apps. The environment uses a Microsoft Dataverse database. The supervisor must be able to create new connections and Microsoft Power Automate flows. The supervisor must not have data access privileges to data in the environment.
You need to assign a role to the supervisor by using the principle of least privilege.
Which security role should you grant to the supervisor?

A. Environment Maker

B. System Customizer

C. System Administrator

D. Environment Admin

Correct Answer: A
Section:

QUESTION 88
A company has used Dynamics 365 Customer Service with Omnichannel for more than a year.
The company has experienced several product recalls over the last three months. Customer agents must follow standardized answers, approved by the legal department to respond to customer questions that are sent in from chats, texts, and phone conversations.
You need to configure the system.

Which two actions should you perform? Each correct answer presents part of the solution.
NOTE: Each correct selection is worth one point.

A. Install the Productivity Tools app from AppSource.
B. Enable the productivity pane.
C. Create a macro.
D. Create an agent script.

Correct Answer: A, B
Section:

QUESTION 89
Customer service agents do not have access to Customer Service historical analytics reports in Dynamics 365 Customer Service.
You need to provide access to the reports.
What are two possible ways to achieve this goal? Each correct answer presents a complete solution.
NOTE: Each correct selection is worth one point.

A. Edit the Customer Service Representative security role to provide read-only access to analytics reports.
B. Create a new model-driven app to expose the reports and provide app access to the Customer Service Representative security role.
C. Create a new security role and provide read-only access to analytics reports.
D. Edit the Customer Service Representative Manager security role to provide read-only access to analytics reports.

Correct Answer: C, D
Section:

QUESTION 90
You are a Dynamics 365 Customer Service system administrator.
You are unable to add 20 hours of phone time to the Entitlement channel.
You need to determine the reason you are unable to add the hours.
What are three possible reasons? Each correct answer presents a complete solution.
NOTE: Each correct selection is worth one point.

A. The Entitlement has been canceled.
B. The Entitlement is in draft mode.
C. The Entitlement is in active mode.
D. The Entitlement start date is in the future.
E. The Entitlement expiration date has passed.

Correct Answer: A, B, D
Section:

QUESTION 91
HOTSPOT
You work for a pharmaceutical company that distributes vaccines.
Vaccines must be kept below negative 60 degrees Celsius or they cannot be used. The company requires a solution that meets the following requirements:
• Monitor vaccine temperatures during transportation.
• Create a customer service case if the temperature goes above negative 60 degrees Celsius.
You need to implement the solution.

Which technologies should you use? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Answer Area

Requirement	Technology
Monitor vaccine temperatures.	IoT Devices ▼
	IoT Devices
	Azure Sphere
	Azure Endpoint Manager
	Azure Monitor
Create rules and conditions.	Azure IoT Central ▼
	Azure IoT Central
	Disconnected Azure Stack
	Azure Front Door Rules engine
	Azure Monitor
Generate an alert.	Azure Monitor Alerts ▼
	Power Automate
	Business process flows
	Azure Notification Hub
	Azure Monitor Alerts
Create a customer service case.	Connected Customer Experience ▼
	Azure IoT Hub
	Connected Customer Experience
	Azure Portal
	Azure Premier Support

Answer Area

Requirement	Technology
Monitor vaccine temperatures.	IoT Devices ▼
Create rules and conditions.	Azure IoT Central ▼
Generate an alert.	Azure Monitor Alerts ▼
Create a customer service case.	Connected Customer Experience ▼

Hot Area:

Answer Area

Requirement	Technology
Monitor vaccine temperatures.	IoT Devices ▼
	IoT Devices
	Azure Sphere
	Azure Endpoint Manager
	Azure Monitor
Create rules and conditions.	Azure IoT Central ▼
	Azure IoT Central
	Disconnected Azure Stack
	Azure Front Door Rules engine
	Azure Monitor
Generate an alert.	Azure Monitor Alerts ▼
	Power Automate
	Business process flows
	Azure Notification Hub
	Azure Monitor Alerts
Create a customer service case.	Connected Customer Experience ▼
	Azure IoT Hub
	Connected Customer Experience
	Azure Portal
	Azure Premier Support

Answer Area:

Answer Area

Requirement	Technology
Monitor vaccine temperatures.	IoT Devices ▼
	IoT Devices
	Azure Sphere
	Azure Endpoint Manager
	Azure Monitor
Create rules and conditions.	Azure IoT Central ▼
	Azure IoT Central
	Disconnected Azure Stack
	Azure Front Door Rules engine
	Azure Monitor
Generate an alert.	Azure Monitor Alerts ▼
	Power Automate
	Business process flows
	Azure Notification Hub
	Azure Monitor Alerts
Create a customer service case.	Connected Customer Experience ▼
	Azure IoT Hub
	Connected Customer Experience
	Azure Portal
	Azure Premier Support

Section:
Explanation:

QUESTION 92
DRAG DROP
A customer has a Customer Service deployment.
The customer needs to implement macros.
You need to identify the security roles that are required to configure and use macros.
Which security roles are required? To answer, move the appropriate security roles to the correct requirements. You may use each security role once, more than once, or not at all. You may need to move the split bar between panes or scroll to view content
NOTE: Each correct selection is worth one point.

Select and Place:

Security Roles		Security Roles	
Customer Service app access		**Requirements**	**Security roles**
Omnichannel administrator		Configure macros.	
Productivity tools administrator		Use macros.	
Productivity tools user			
Sequence manager			

Correct Answer:

Security Roles		Security Roles	
Customer Service app access		**Requirements**	**Security roles**
Omnichannel administrator		Configure macros.	Productivity tools administrator
		Use macros.	Productivity tools user
Sequence manager			

Section:
Explanation:

QUESTION 93
A company manufactures installs, and maintains residential water filtration systems. The company implements Dynamics 365 Customer Service.
Installation technicians call support technicians when they encounter issues during system installations.
You must create step-by-step documentation for the support technicians.
Which two fields must you include? Each correct answer presents part of the solution.
NOTE: Each coned selection is worth one point.

A. Owner
B. Description
C. Language
D. Agent script

Correct Answer: B, D
Section:

QUESTION 94
DRAG DROP
You are an Omnichannel administrator for a company. The company is implementing a chat channel.
You need to route all chats relating to work orders to the field service queue.
In which order should you perform the actions? To answer, move all actions from the list of actions to the answer area and arrange them in the correct order,
NOTE: More than one order of answer choices is correct. You will receive credit for any of the correct orders you select.

Select and Place:

Actions		Answer area
Create a new entity routing channel record for field service and add Work Order as an active entity.		1
Add a new rule routing set for work orders.		2
Create a Rule Item and specify the rule criteria and action to route to the Field Service Queue.		3
Enable the work order entity for queues and activities.		4
Create a queue named field service.		5

Correct Answer:

Actions		Answer area
		1 Enable the work order entity for queues and activities.
		2 Create a queue named field service.
		3 Create a new entity routing channel record for field service and add Work Order as an active entity.
		4 Add a new rule routing set for work orders.
		5 Create a Rule Item and specify the rule criteria and action to route to the Field Service Queue.

Section:
Explanation:

Actions		Answer area
		1 Enable the work order entity for queues and activities.
		2 Create a queue named field service.
		3 Create a new entity routing channel record for field service and add Work Order as an active entity.
		4 Add a new rule routing set for work orders.
		5 Create a Rule Item and specify the rule criteria and action to route to the Field Service Queue.

QUESTION 95
DRAG DROP
A company is using Omnichannel for Customer Service.
You add a live chat button to your company's website for existing customers. Requests for chats are handled by the next available representative. The chat must route the customer to the same representative if the customer is inadvertently disconnected.
You need to configure the chat.
Which four actions should you perform in sequence? To answer, move the appropriate actions from the list of actions to the answer area and arrange them in the correct order.
NOTE: More than one order of answer choices is correct. You will receive credit for any of the correct orders you select.

Select and Place:

Actions	Answer area
Create the survey in the Live Chat record.	
Set the topic Status to **On**.	
Create the survey in Forms Pro.	
Create a work stream.	
Set the routing rule.	
Set the Enable Agent Affinity to **Yes**.	
Create context variables.	

Correct Answer:

Actions	Answer area
Create the survey in the Live Chat record.	Create a work stream.
Set the topic Status to **On**.	Set the routing rule.
Create the survey in Forms Pro.	Set the Enable Agent Affinity to **Yes**.
	Create context variables.

Section:
Explanation:

Actions		Answer area
Create the survey in the Live Chat record.	1	Create a work stream.
Set the topic Status to **On**.	2	Set the routing rule.
Create the survey in Forms Pro.	3	Set the Enable Agent Affinity to **Yes**.
	4	Create context variables.

QUESTION 96
A company is implementing Omnichannel for Dynamics 365 Customer Service. The company's requirements are:
• Live chat must be available through Omnichannel for cases only.
• High-priority cases must automatically be sent to the next available agent.
• Lower-priority cases must wait to be picked up by an agent
• All work must be distributed evenly with no other conditions.

You need to select the setup that meets the requirements. Which setup should you select?

A. one workstream and one routing rule
B. one workstream and two routing rules
C. two workstreams and two routing rules per workstream
D. two workstreams and one routing rule per workstream

Correct Answer: B
Section:

QUESTION 97
You are customizing an Omnichannel for Customer Service implementation.
You configure the handoff process to Omnichannel for Customer Service from Power Virtual Agents.
However, customer conversations are not escalating to human
agents.
You need to complete the configuration to resolve the issue.
Which two features should you configure? Each correct answer presents part of the solution.
NOTE: Each correct selection is worth one point.

A. context variable
B. bot in an Omnichannel Queue
C. Smart Assist
D. session template for the bot

Correct Answer: A, B
Section:

QUESTION 98
DRAG DROP
A company uses Dynamics 365 Customer Service. The company connects chatbots to its Omnichannel configuration.
The chatbot does not escalate calls to agents.
You need to troubleshoot the chatbot issue.
In which order should you perform the actions? To answer, move all actions from the list of actions to the answer area and arrange them in the correct order.
NOTE: More than one order of answer choices is correct. You will receive credit for any of the correct orders you select.

Select and Place:

Correct Answer:

Section:
Explanation:

QUESTION 99
DRAG DROP
A company has a Dynamics 365 Customer Service implementation that uses the voice channel feature. Supervisors need to review reports to see how the representatives are performing on the following metrics:
• Percentage of calls that are answered within 30 seconds in the previous four hours.
• Number of calls that are rejected by each representative in the previous four hours.
You need to change the configuration of reports to ensure that they default to the requirements.
Which reports should you configure? To answer, drag the appropriate reports to the correct metrics.
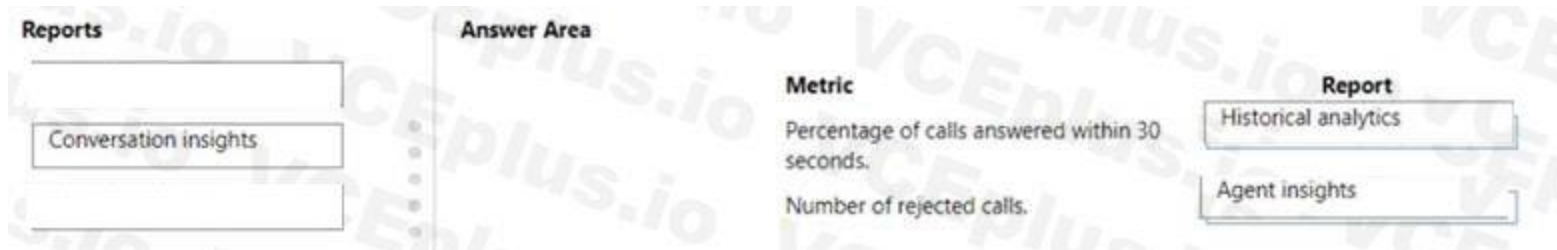Each report may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.
NOTE: Each correct selection is worth one point.

Select and Place:
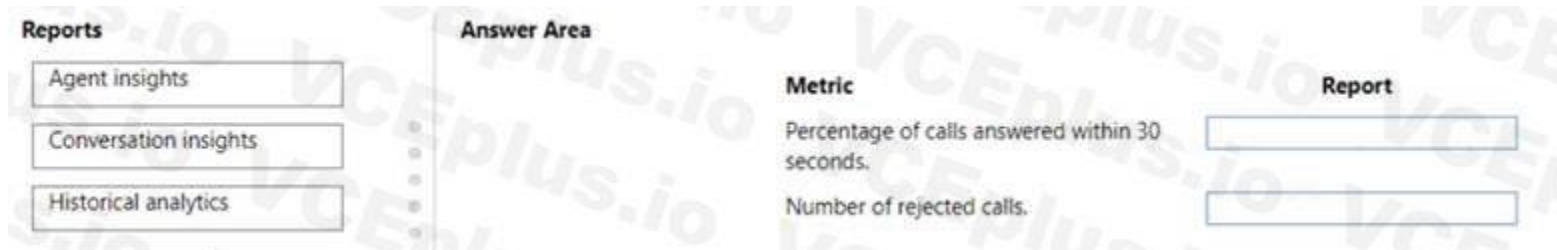
Correct Answer:

Section:
Explanation:

QUESTION 100
DRAG DROP
A company uses Dynamics 365 Customer Service.
Help desk representatives must be able to open multiple sessions. Each representative must have the same application experience when logging into the application. Agents must provide a standard response depending on what the customer issue is when someone calls in for support. The standardized response must use the same language each time.
You need to configure the required features.
What should you configure? To answer drag the appropriate configurations to the correct requirements. Each configuration may be used once, more than once, or not at all You may need to drag the split bar between panes or scroll to view content.

Select and Place:

Configurations		Answer Area	
Agent scripts		**Requirement**	**Configuration**
App profile manager		Uniform application experience	
Smart assist		Standard response	

Correct Answer:

Configurations		Answer Area	
		Requirement	**Configuration**
		Uniform application experience	App profile manager
Smart assist		Standard response	Agent scripts

Section:
Explanation:

QUESTION 101
A company implements Customer Service
You enable Customer Service historical analytics.
You need to identify which feature is enabled automatically when Customer Service historical analytics is enabled.
Which feature should you identify?

A. Real-time customer sentiment
B. Forecasting
C. AI topic clustering
D. AI suggestions

Correct Answer: A
Section:

QUESTION 102
DRAG DROP

A contact center superviser requires operations metrics by channel and sentiment analysis.

You need to install the Omnichannel insights dashboard for the company.

In which order should you perform the actions? To answer, move all actions from the list of actions to the answer area and arrange them in the correct order.

NOTE: More than one order of answer chokes is correct. You will receive credit for any of the correct orders you select.

Select and Place:

Correct Answer:

Section:

Explanation:

Verify that you have administrator privileges for Power BI and Omnichannel.

Install Ominchannel Insights.

Connect the Omnichannel Insights for Dynamic 365 app to get the data.

Configure the Power BI dataset referesh frequency.

Publish the app for the company.

QUESTION 103

You are customizing an Omnichannel for Customer Service implementation.

A call center wants to enable a chat channel for unauthenticated chats with the following requirements:

* Chat must auto detect a customer for agents.

* A chat widget must be embedded in a specific domain.

You need to customize the solution that meets the requirements.

Which two options you should select? Each correct answer presents part of the solution.

NOTE: Each correct selection is worth one point.

A. widget location

B. proactive chat

C. visitor location

D. pre-chat survey

Correct Answer: A, B

Section:

QUESTION 104
DRAG DROP
Your company uses Dynamics 365 Customer Service.
The company wants to send a customer survey to each customer when a case is closed. The survey must include the following:
* An area with a list of questions that rate the answers as poor, average, or great.
* A question that rates whether the customer would recommend your company to others.
The company wants to exclude symbols from any of the question types.
You need to configure the question types.
Which question type should you use? To answer, drag the appropriate question type to the correct requirement. Each question type may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.
NOTE: Each correct selection is worth one point.

Select and Place:

Question types		Answer Area	
Likert		**Requirement**	**Question type**
Net Promoter Score		List of questions	
Rating		Recommendation question	

Correct Answer:

Question types		Answer Area	
		Requirement	**Question type**
		List of questions	Likert
Rating		Recommendation question	Net Promoter Score

Section:
Explanation:

QUESTION 105
A company uses Dynamics 365 Customer Service.
Managers state that support representatives can view contact social security numbers when the representatives open contact records.
Support representatives must only be able to verify that the social security number is saved. They must not be able to view the number.
You need to configure the application to resolve the issue.
What should you do?

A. Create a Power Automate flow.
B. Set up a business rule to hide the column if it contains data.
C. Set up field-level security.
D. Remove the column from the form.

Correct Answer: C
Section: