Number: MB-230
Passing Score: 800
Time Limit: 120
File Version: 18.0

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

Case - Implement scheduling

Case study

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Qbutton to return to the question.

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
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 2
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 3

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

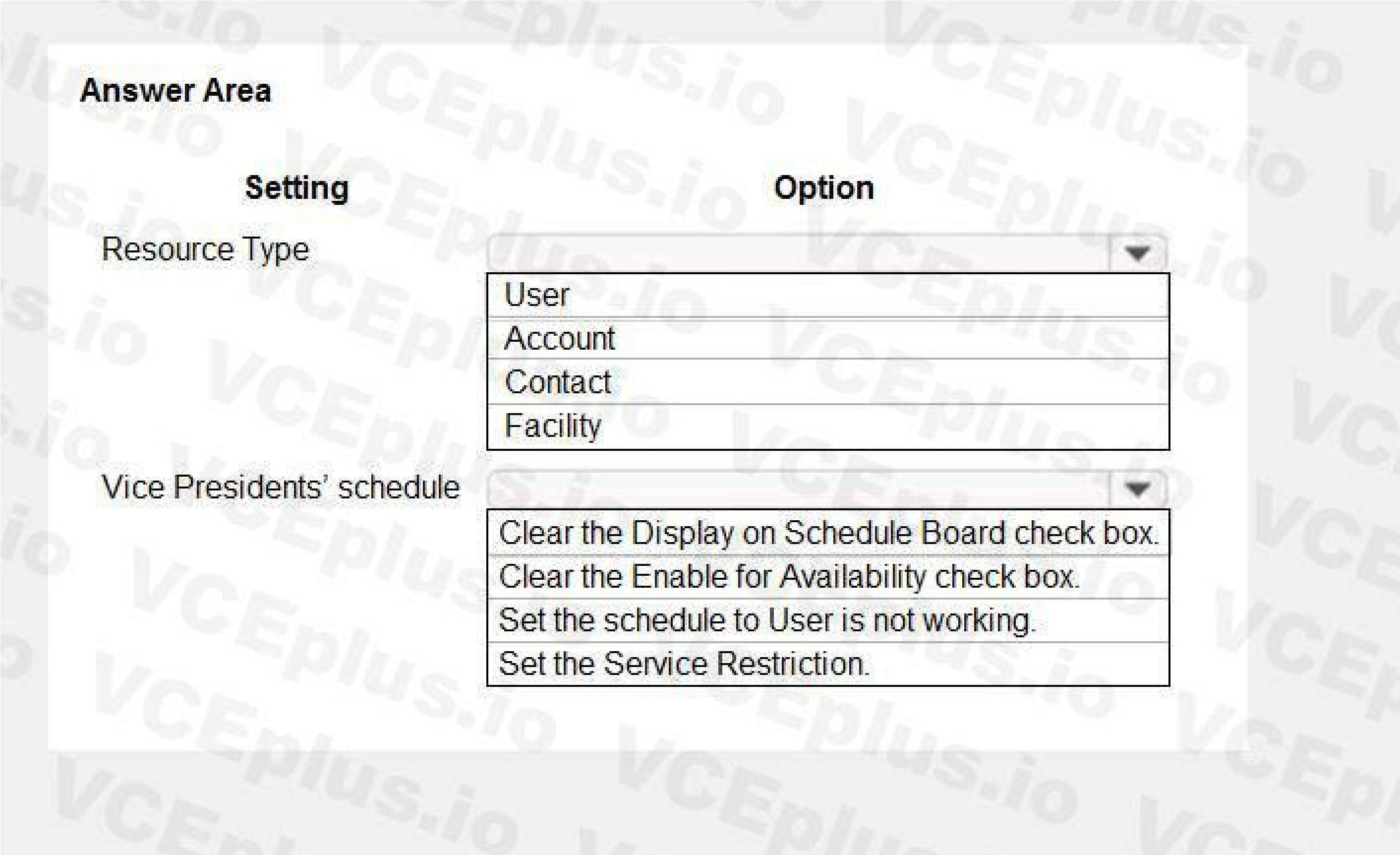
QUESTION 4
You need to configure the system to meet the workspace requirements for case representatives.
Which role should you assign to case representatives?

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

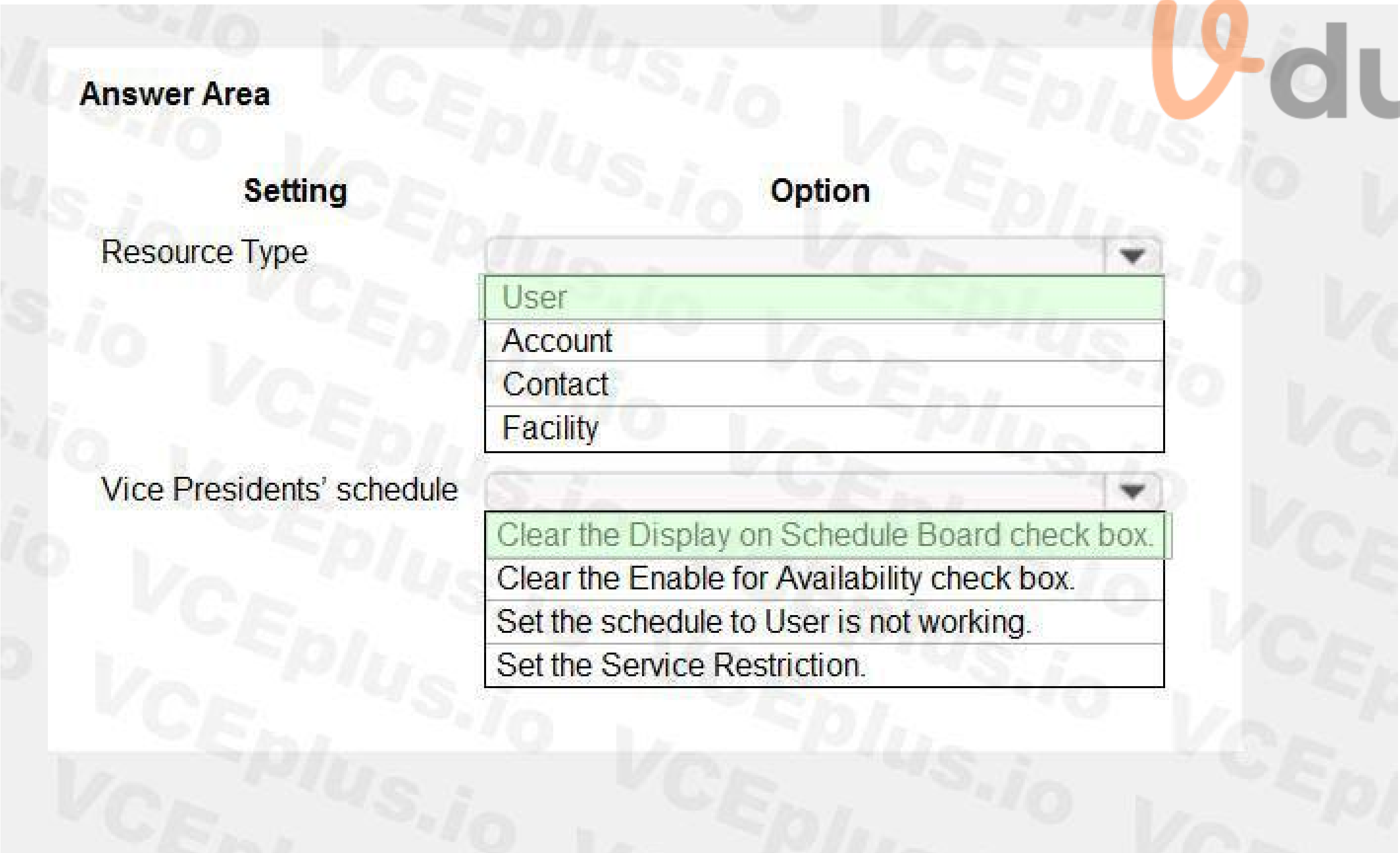
Correct Answer: C
Section:

QUESTION 5
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:



Section:

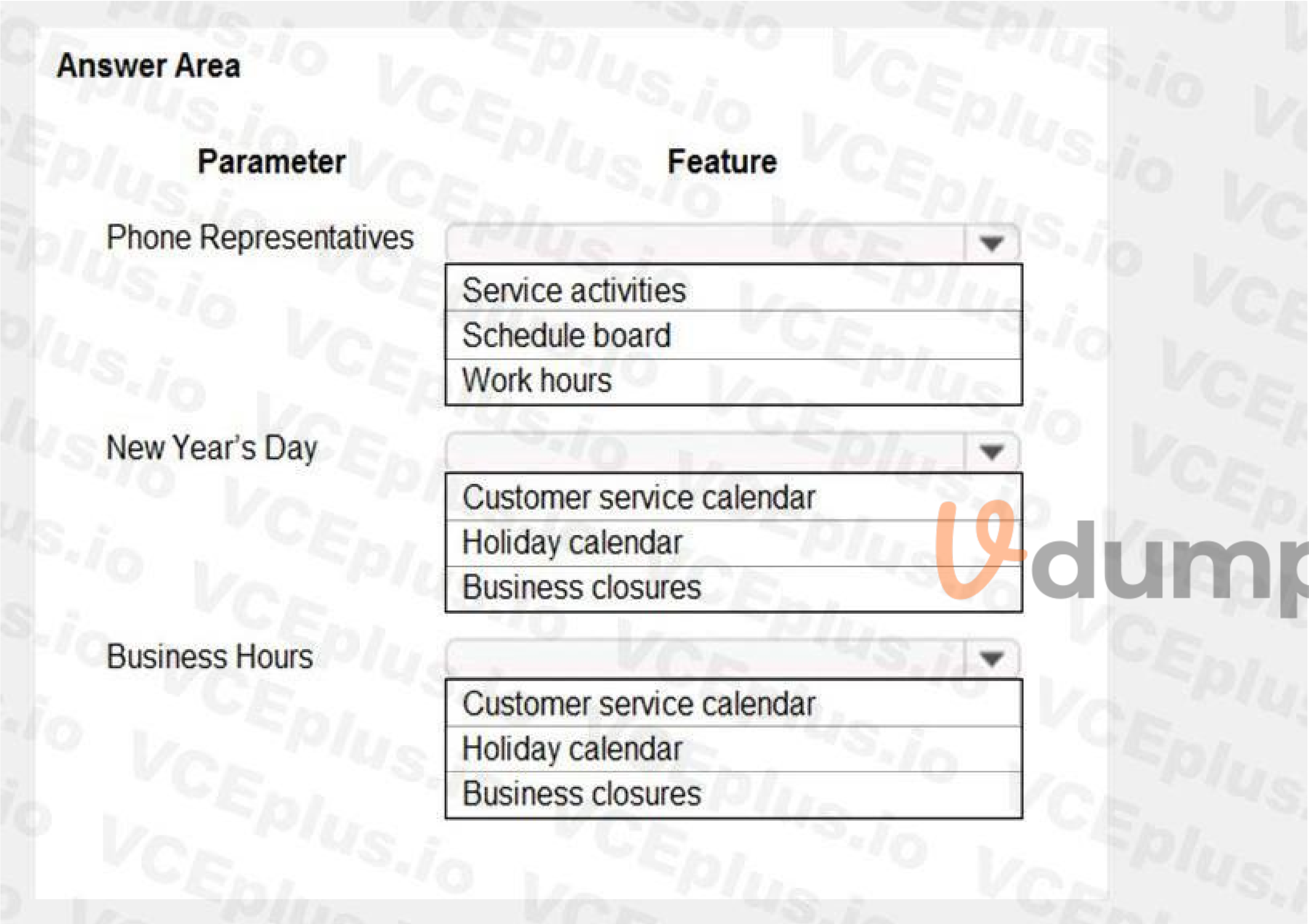
Explanation:

Reference:

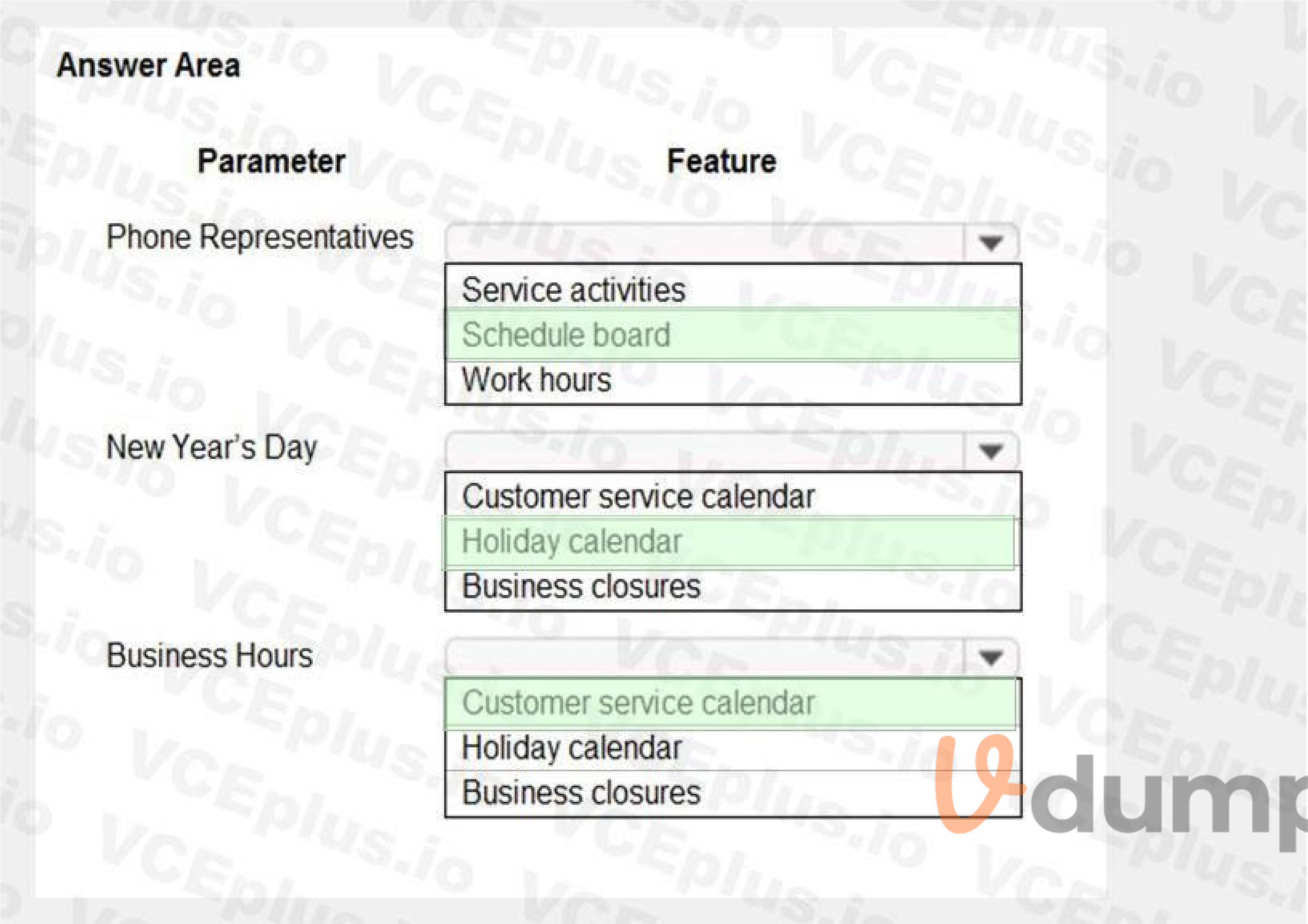
https://docs.microsoft.com/en-us/dynamics365/customer-service/resources-service-scheduling

QUESTION 6
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:



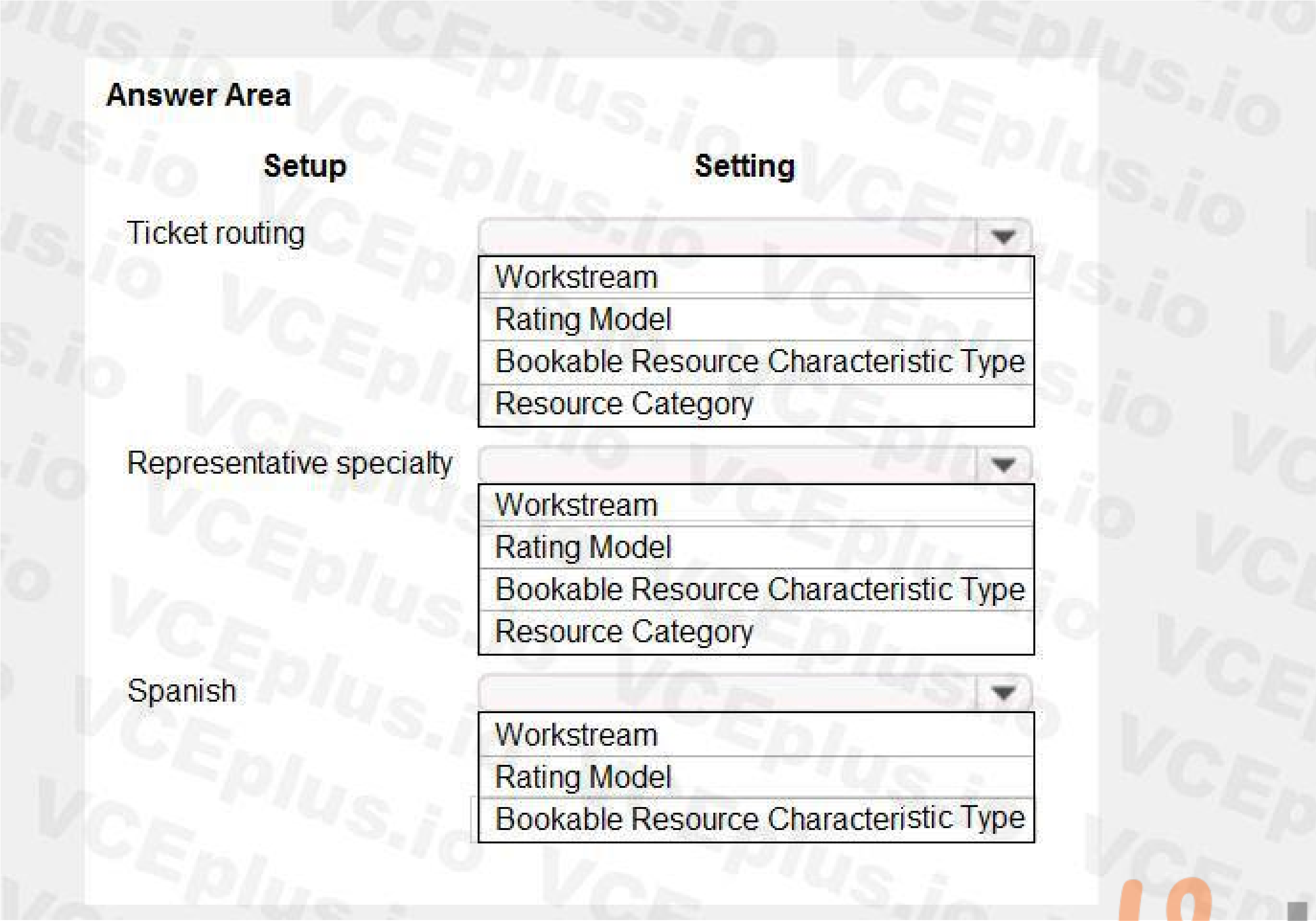
Answer Area:



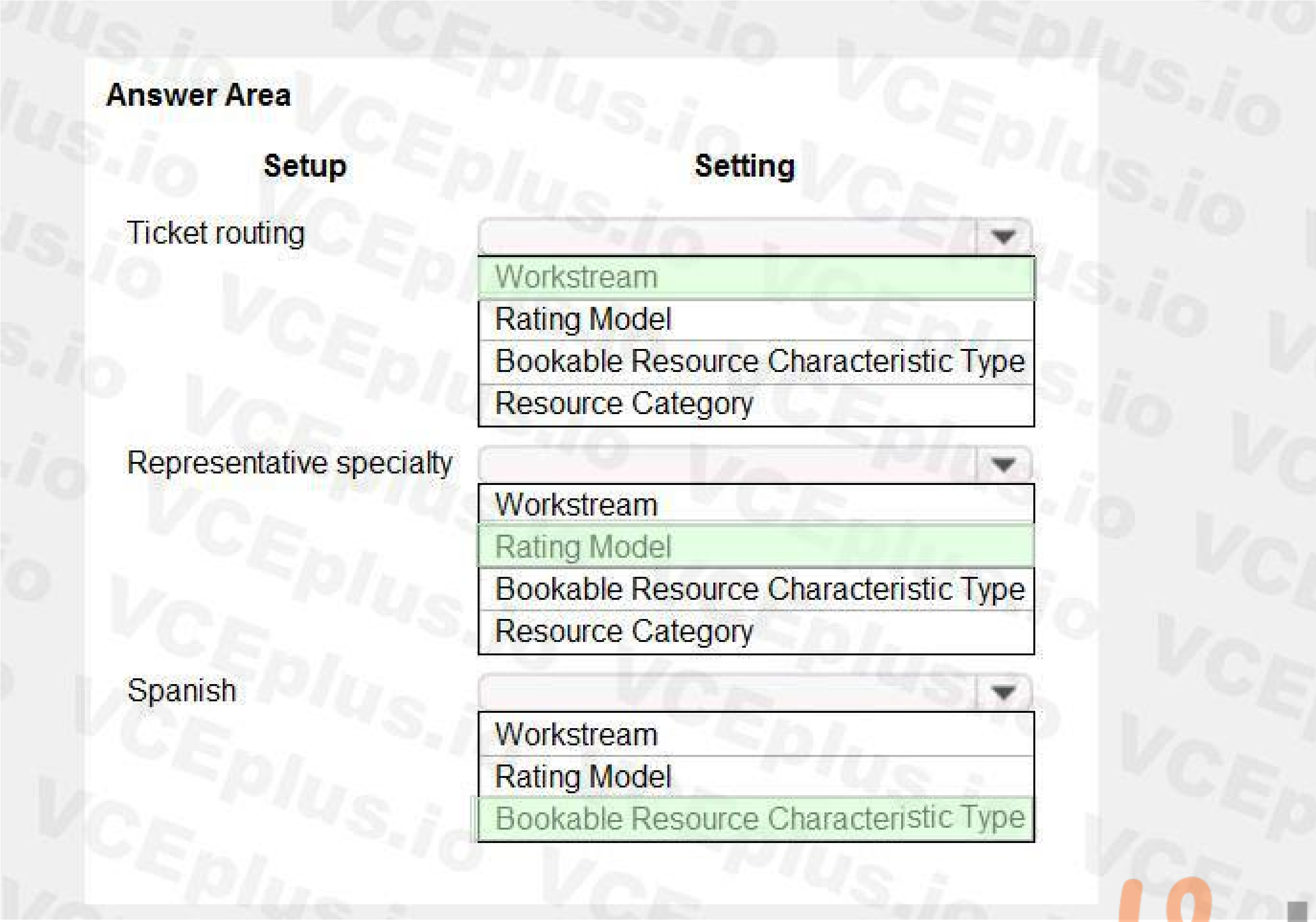
Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-service/create-operating-hours

QUESTION 7
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:



Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-service/create-workstreams
https://docs.microsoft.com/en-us/dynamics365/customer-service/enable-skill-routing-create-rating-model

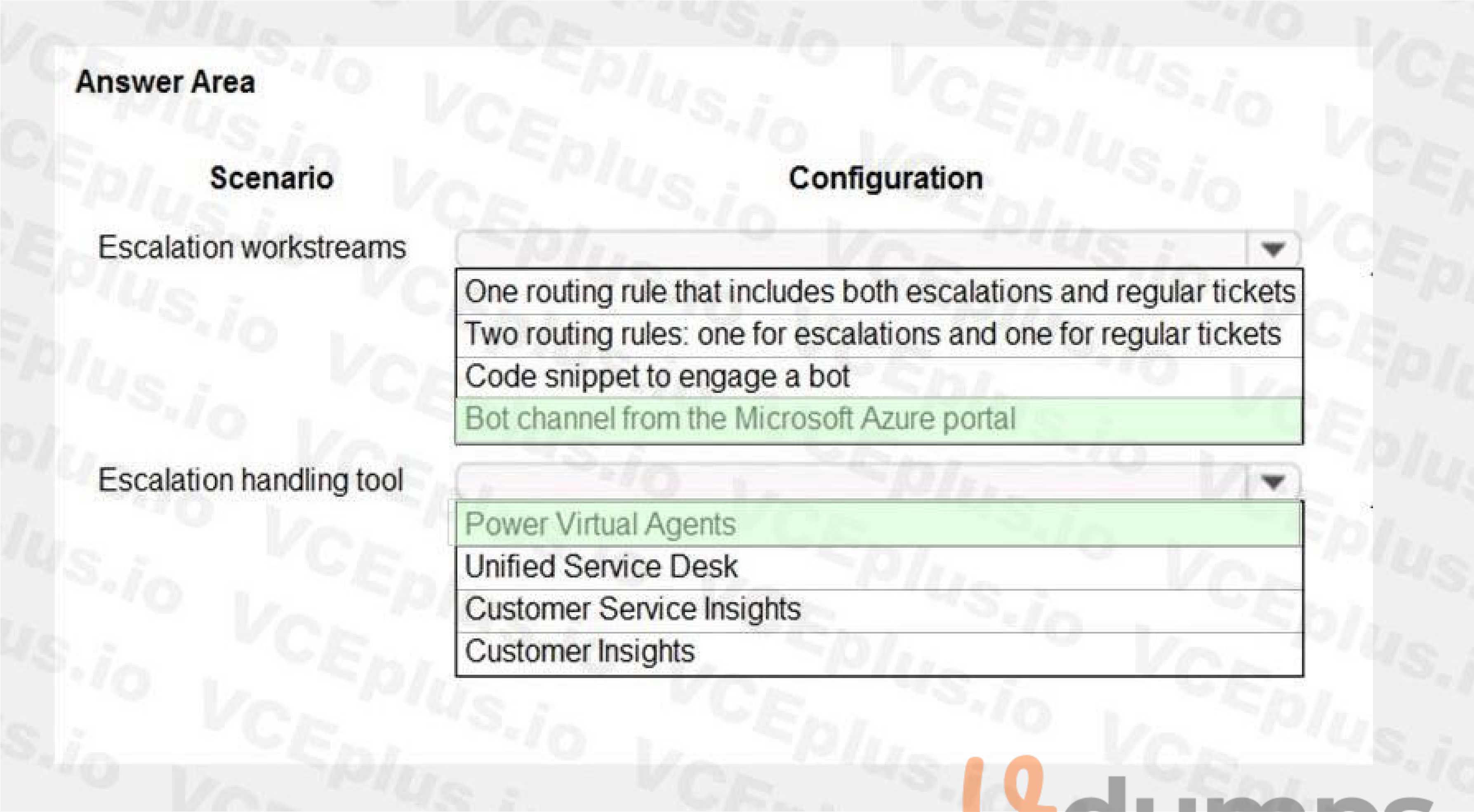
QUESTION 8
HOTSPOT
You need to configure each escalation scenario.
Which configuration should you use for each scenario? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

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

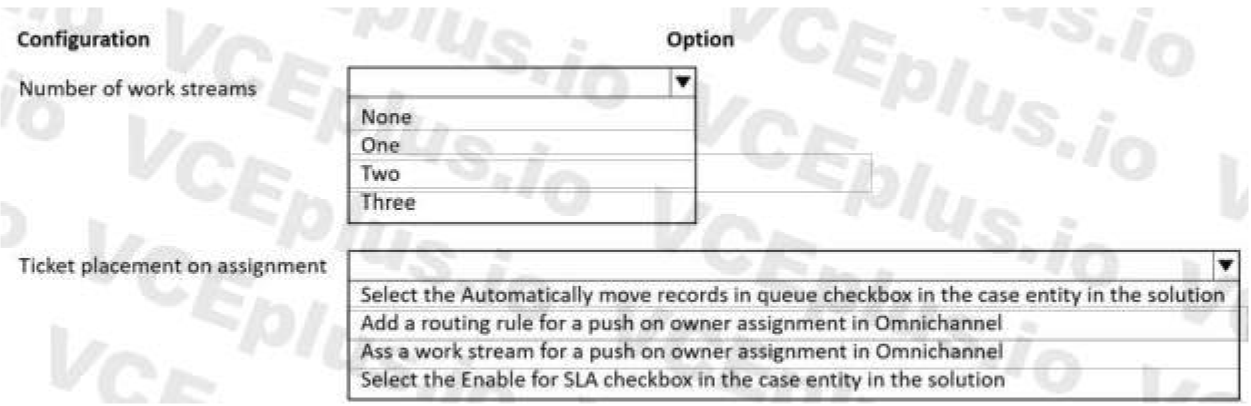
Answer Area:



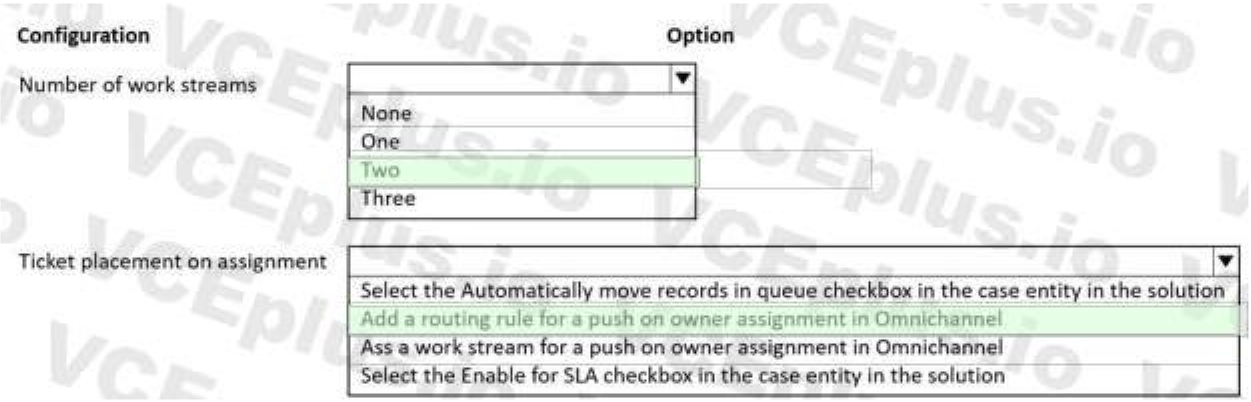
Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-service/configure-bot-virtual-agent

QUESTION 9
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:



Answer Area:



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 10
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:

Correct Answer:

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

Case - The Phone Company
Case study
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Qbutton to return to the question.
Overview
The Phone Company provides mobile devices and services to corporate clients. Each client corporation has different agreements and service level agreements (SLAs) in place. Most clients have agreements that last one year and have 30 cases available. Half the cases may be opened by phone.
The other half may be opened by email.
The company has an existing on-premises software system. The current system no longer meets the company's needs.
The support desk is open 8:00 am to 8:00 pm Eastern Standard Time.
Requirements
Support desk
The company plans to implement Dynamics 365. The solution will include a custom entity that needs to be search enabled.
You must configure the system to ensure that you can determine how many support tickets and new orders tickets are received. You must be able to determine which device types have the most tickets opened for issues.
Business hours in the system must reflect the hours support staff is scheduled.
Case handling
New cases must automatically route to the correct support group by phone type or new purchase group without requiring custom code.
The system must automatically create a case when email is received by companies that are not in the system.
The system must automatically send a response to an email sender upon case creation for new orders, but not for service records.
Users must be able to initiate routing for manually created cases.
The system must create sub-cases from one customer with different cases and also if the same issue is reported by several customers. Subcases must inherit the following fields: customer name, contact email address and case title.
Main cases must not be closed until all the sub-cases are closed.
Separate groups must be created for each type of service and each phone type. Access to the groups must be restricted to team members that support that service or phone type.
When importing from the old system, old cases do not need to be routed to the correct support group.
Knowledge base
Users must be able to search the knowledge base when opening a new case form or when checking on cases.
Users must be able to use relevant searches and include any customer entities.
Dashboards
Managers must be able to see a real-time list of open cases, open activities, and expiring entitlements all on one page.
Managers must also be able to see all open cases, escalated cases and cases by representatives on one screen. Managers must be able to drill down within each area.
Managers need a dashboard that displays weekly statistics for cases and representatives.
Each representative needs to see their own tickets that are opened for the day, week, and month as well as their closed tickets.
Service-level agreements
Most customers must be contacted within 90 minutes of their case being opened.
Some customers can purchase faster service on call backs.
Emails must be sent to support managers when service-level agreements (SLAs) are missed.
Support representatives must be able to see a timer on each case form to ensure they are adhering to their SLAs.
SLA KPIs must be tracked in the system.
SLA KPIs must appear on the case form.
Cases must be able to be placed on hold if issues arise with related contracts.
Issues
Users report they are not able to search the Knowledge Base.

QUESTION 1
You need to enable relevance search for the custom entity.
Which two actions should you perform? Each correct answer presents part of the solution.
NOTE: Each correct selection is worth one point.

A. Add Quick Find to the case form.
B. Add custom entities to Configure Relevance Search in Customizations and Entities.
C. Add Knowledge Base Search control to the forms case.
D. Enable Relevance Search in System Settings.

Correct Answer: B
Section:
Explanation:
Reference:
https://carldesouza.com/how-to-use-relevance-search-in-dynamics-365/

QUESTION 2
You need to ensure users can search the knowledge base from a case record.
Which two actions should you perform? Each correct answer presents part of the solution.
NOTE: Each correct selection is worth one point.

A. Add Knowledge Base Search control to the dashboard.
B. Check Knowledge Management from the case entity in the solution.
C. Insert the Knowledge Base Search control on the form.
D. Select the Knowledge Base Search control from the entity.
E. Add the Quick Find option to the views.

Correct Answer: B, C
Section:

QUESTION 3
You need to add SLA timers to the Case form.
Which two options should you configure? Each correct answer presents part of the solution.
NOTE: Each correct selection is worth one point.

A. Create Quick View Form in SLA KPI Instance entity.
B. Create SLA KPI Instance entity.
C. Create field in case entity with lookup to SLA KPI Instance.
D. Create Quick View Form in Case entity with reference to the SLA KPI Instance entity.
E. Insert subgrid from the SLA KPI Instance entity into the Case Main form.

Correct Answer: C, E
Section:
Explanation:

QUESTION 4
You need to create the queue for cases.
What type of queue should you create?

A. Teams
B. Public

C. Product
D. Private
E. Service

Correct Answer: D
Section:
Explanation:

QUESTION 5
You need to configure the system so that an email is sent to a manager about the SLAs according to the requirements.
What should you configure?

A. Failure Action
B. Warning Action
C. Applicable When
D. Success Criteria
E. Success Action

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

QUESTION 6
You need to implement service-level agreements.
Which type of agreements should you implement?

A. On-demand
B. Standard
C. Enhanced
D. Contact

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

QUESTION 7
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.

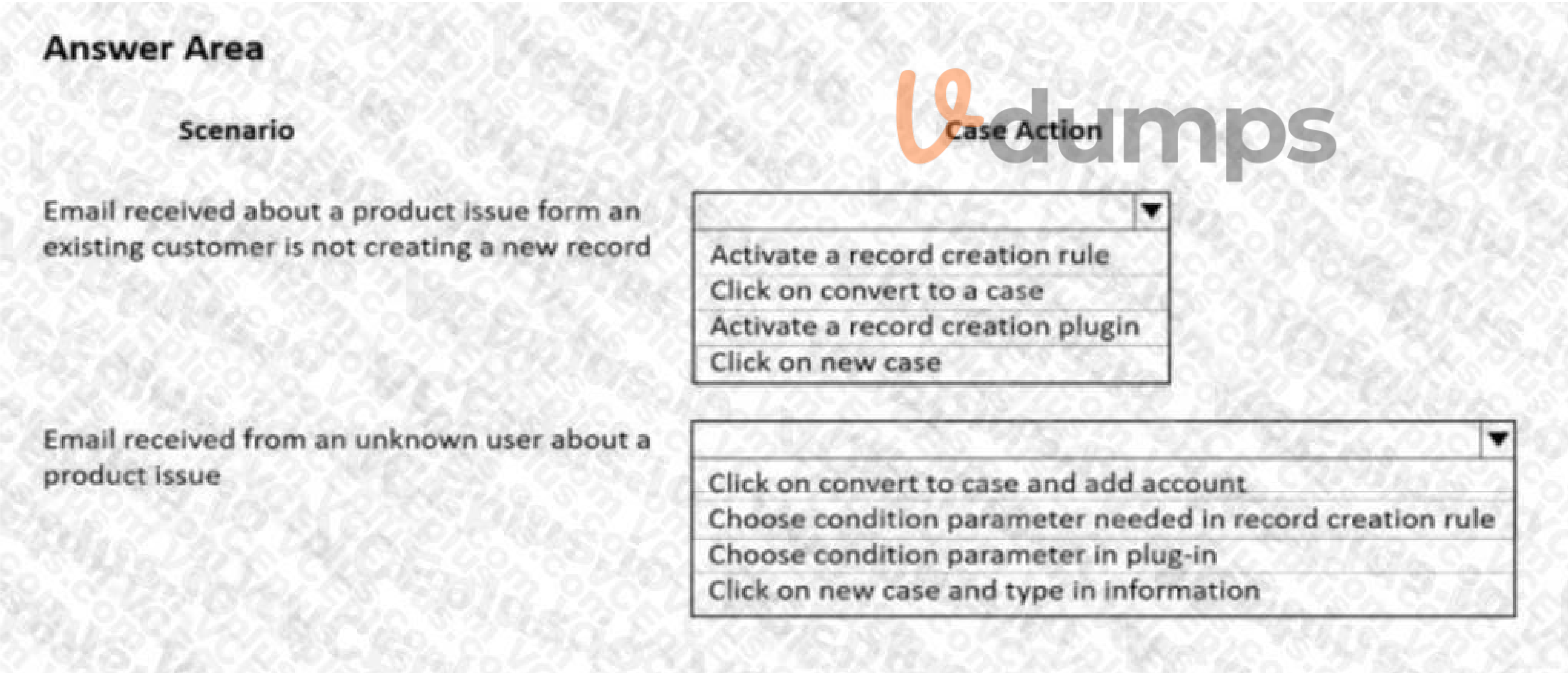
A. Use an existing customer SLA and change the conditions after assigning the SLA to the customer record.

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.

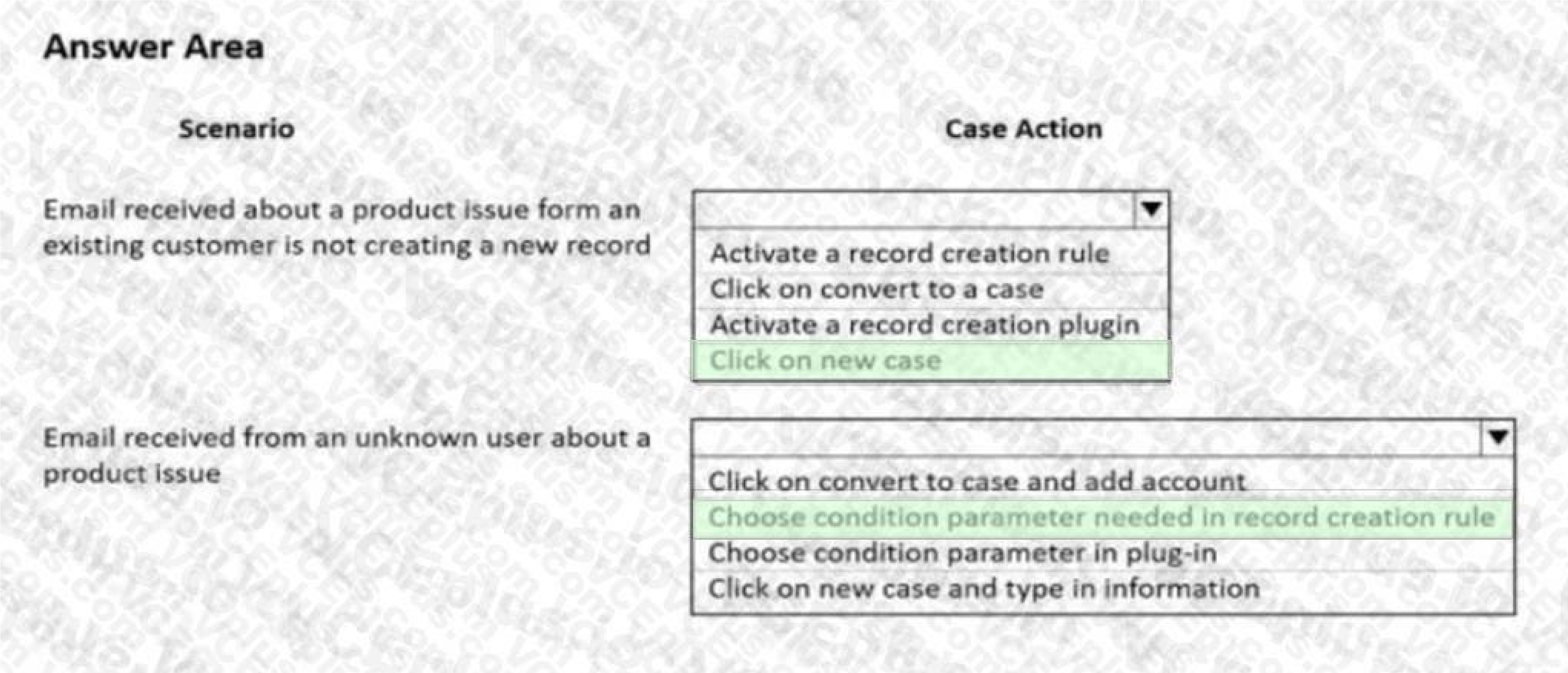
Correct Answer: D, E
Section:
Explanation:
Apply SLAs on demand.
With the enhancements made to SLAs, you can now apply SLAs to records manually. You can also automatically apply SLAs to records based on your business logic by using workflows or custom plugins.
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-service/define-service-level-agreements

QUESTION 8
HOTSPOT
You need to meet the automatic case creation requirements.
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:
Reference: https://docs.microsoft.com/en-us/dynamics365/customer-service/automatically-create-case-from-email
https://cloudblogs.microsoft.com/dynamics365/it/2017/07/25/convert-email-to-a-case-with-a-few-clicks-in-dynamics-365-appfor-outlook/

QUESTION 9
HOTSPOT
You need to ensure cases are handled correctly.
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
Handle incoming cases	Create an automatic workflow Create a plugin Create a routing rule Create a menu option
Import all classes from old system per requirements	In the Add Route Case for the import file, add the value no for all records In the Add Route Case for the import file, add the value yes for all records In spreadsheet for column Add Route Case add the value No Routing for all records Manually add each record
Route cases that are entered manually	Use an existing routing rule Create a second routing rule Create a workflow that is set as an on-demand process Use existing plugin

Answer Area:

Answer Area

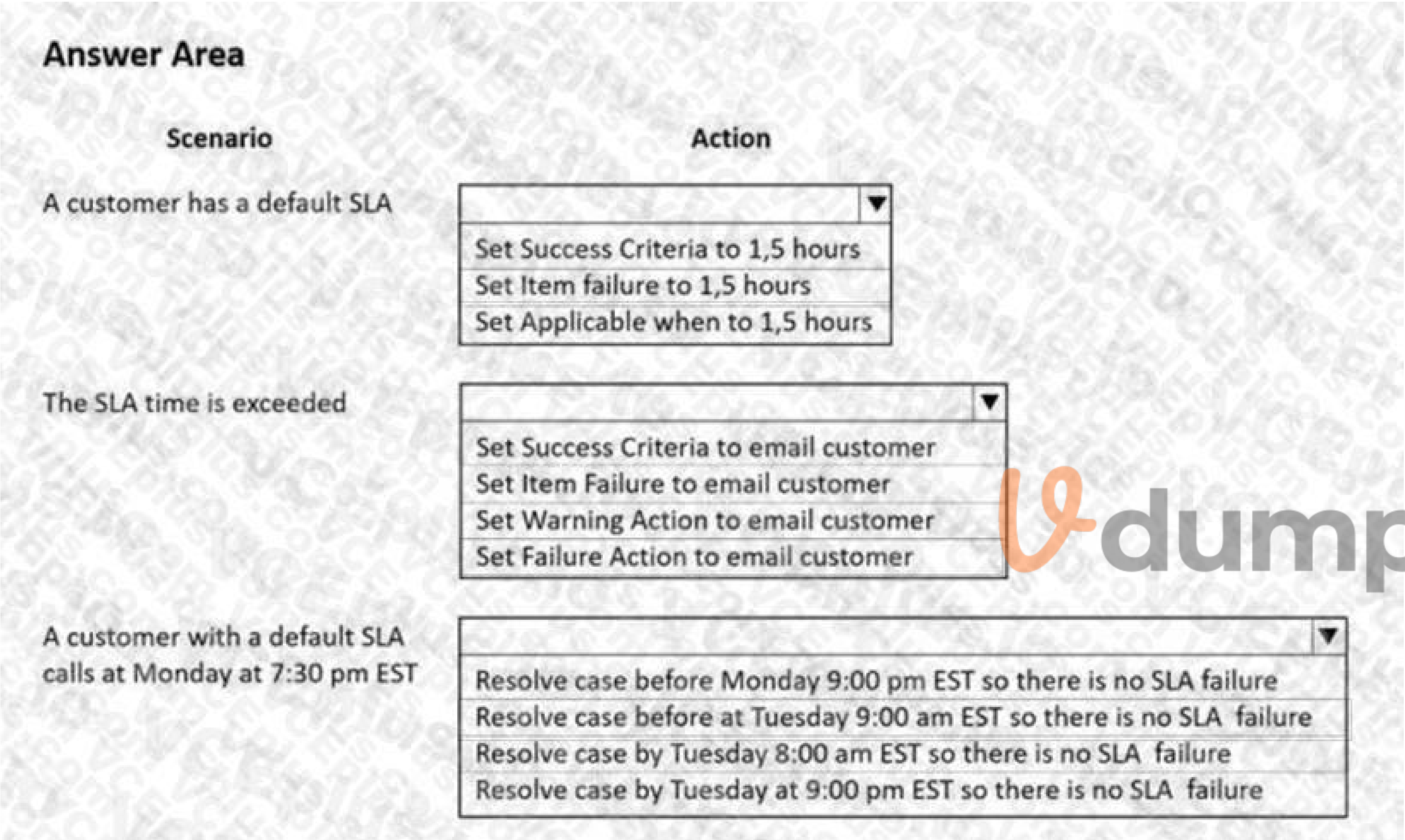
Requirement	Action
Handle incoming cases	Create an automatic workflow Create a plugin Create a routing rule Create a menu option
Import all classes from old system per requirements	In the Add Route Case for the import file, add the value no for all records In the Add Route Case for the import file, add the value yes for all records In spreadsheet for column Add Route Case add the value No Routing for all records Manually add each record
Route cases that are entered manually	Use an existing routing rule Create a second routing rule Create a workflow that is set as an on-demand process Use existing plugin

Section:
Explanation:

Reference: https://docs.microsoft.com/en-us/dynamics365/customer-service/overview-unified-routing

QUESTION 10
HOTSPOT
You need to decide which action is applicable in the SLA.
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:

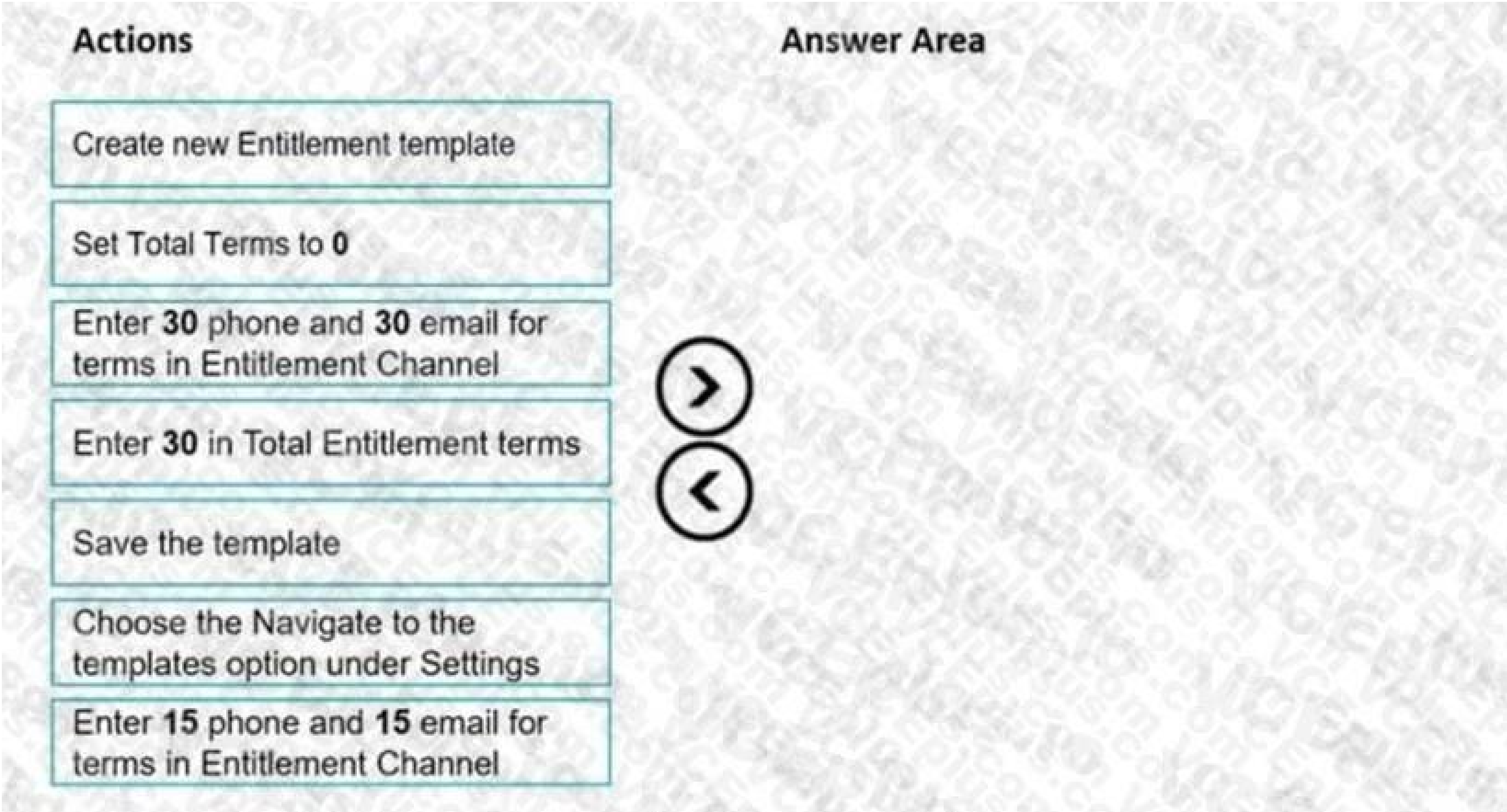
Answer Area

Scenario	Action
A customer has a default SLA	Set Success Criteria to 1,5 hours Set Item failure to 1,5 hours Set Applicable when to 1,5 hours
The SLA time is exceeded	Set Success Criteria to email customer Set Item Failure to email customer Set Warning Action to email customer Set Failure Action to email customer
A customer with a default SLA calls at Monday at 7:30 pm EST	Resolve case before Monday 9:00 pm EST so there is no SLA failure Resolve case before at Tuesday 9:00 am EST so there is no SLA failure Resolve case by Tuesday 8:00 am EST so there is no SLA failure Resolve case by Tuesday at 9:00 pm EST so there is no SLA failure

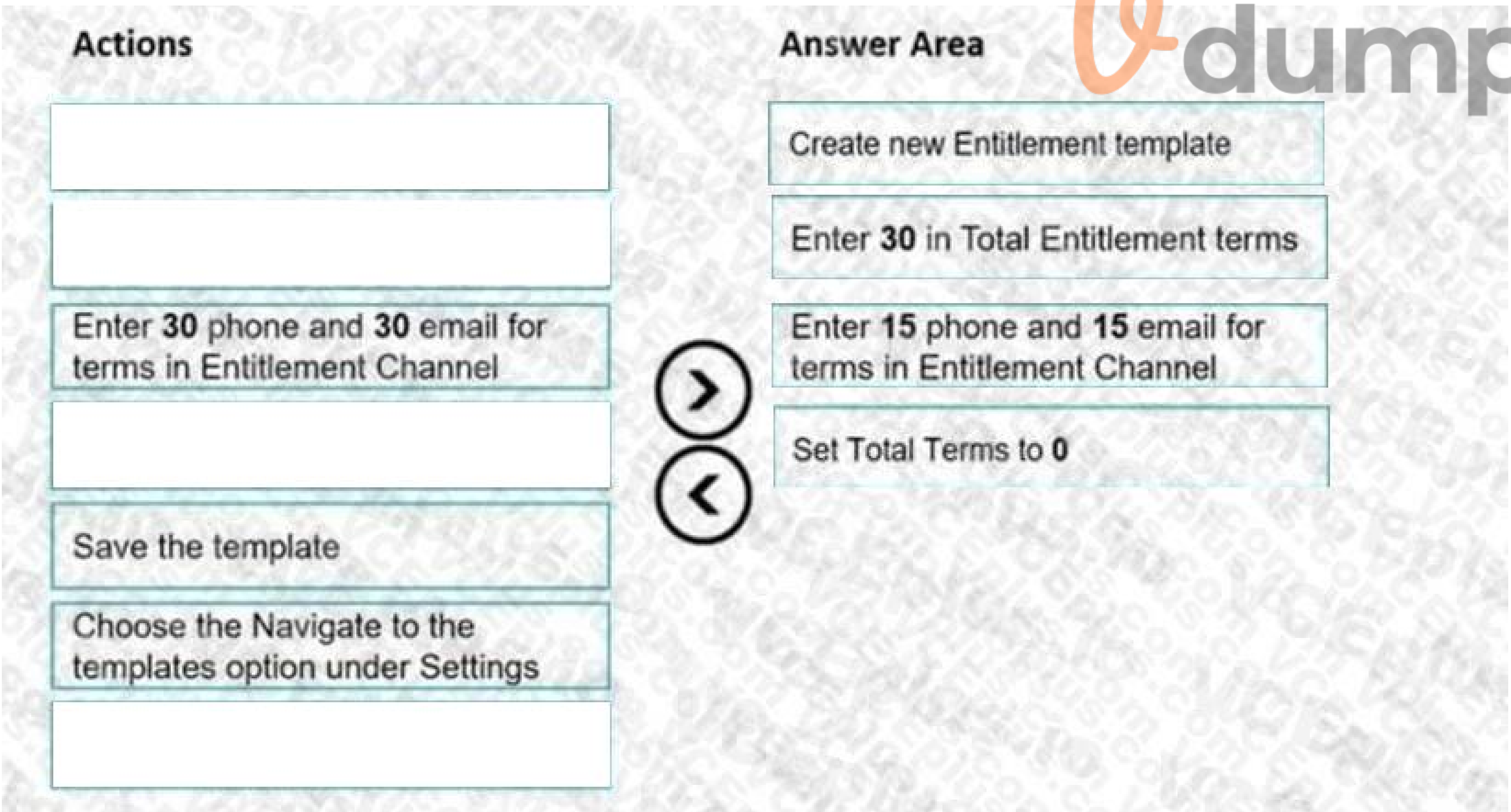
Section:
Explanation:
Reference: https://docs.microsoft.com/en-us/dynamics365/customer-service/define-service-level-agreements

QUESTION 11
DRAG DROP
You need to create an entitlement template. In System Settings, you navigate to Service Management.
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:



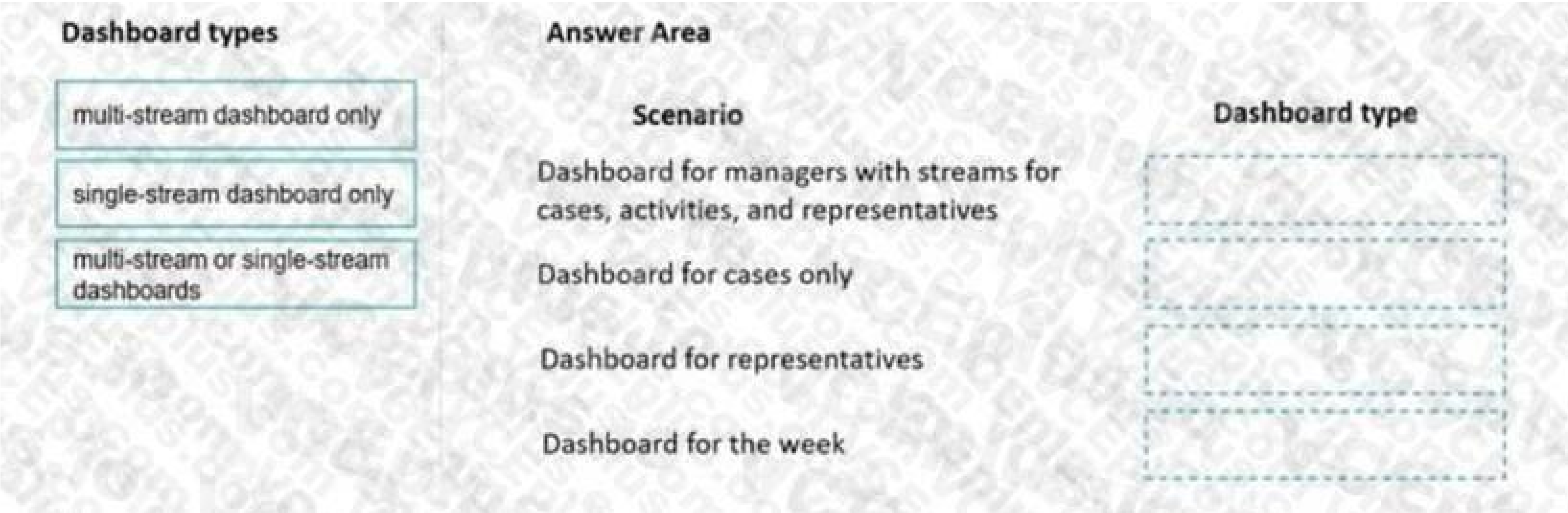
Correct Answer:



Section:
Explanation:
Reference: https://docs.microsoft.com/en-us/dynamics365/customer-service/set-up-entitlements-templates

QUESTION 12
DRAG DROP
You need to create the dashboards.
Which dashboard types should you use? To answer, drag the appropriate dashboard types to the correct scenario. Each dashboard 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:



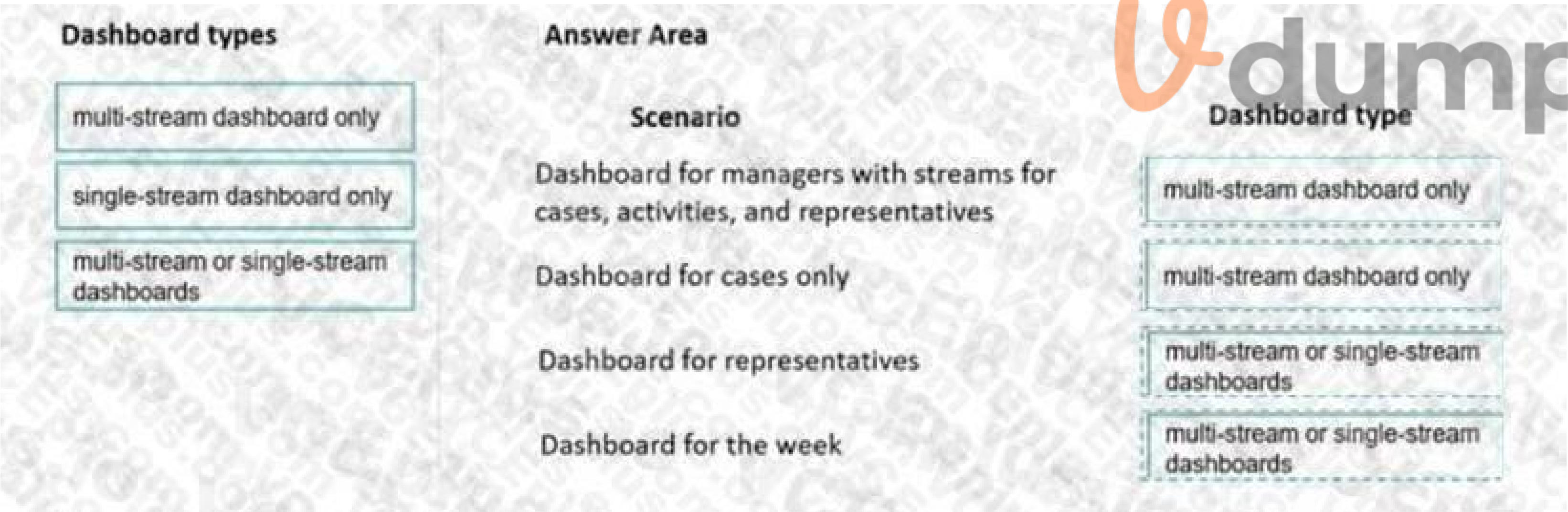
Dashboard types

- multi-stream dashboard only
- single-stream dashboard only
- multi-stream or single-stream dashboards

Answer Area

Scenario	Dashboard type
Dashboard for managers with streams for cases, activities, and representatives	
Dashboard for cases only	
Dashboard for representatives	
Dashboard for the week	

Correct Answer:



Dashboard types

- multi-stream dashboard only
- single-stream dashboard only
- multi-stream or single-stream dashboards

Answer Area

Scenario	Dashboard type
Dashboard for managers with streams for cases, activities, and representatives	multi-stream dashboard only
Dashboard for cases only	multi-stream dashboard only
Dashboard for representatives	multi-stream or single-stream dashboards
Dashboard for the week	multi-stream or single-stream dashboards

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

Exam C

QUESTION 1
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 a Dynamics 365 for Customer Service system administrator for Contoso, Ltd.
You need to automatically create cases from emails sent to the support@contoso.com email address.

Solution: Create an automatic record creation and update rule. Set the Source type to Email, and then select the queue. Configure autoresponse settings.
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/customerservice/automatically-createcase-from-email

QUESTION 2
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 a Dynamics 365 for Customer Service system administrator for Contoso, Ltd.
You need to automatically create cases from emails sent to the support@contoso.com email address.
Solution: Create an automatic record creation and update rule. Set the Source type to Service activity, and then select the queue.
Does the solution meet the goal?

A. Yes
B. No

Correct Answer: B
Section:

QUESTION 3
You use Dynamics 365 for Customer Service.
You need to create business process flows.
Which three entities can you use? Each correct answer presents part of the solution.
NOTE: Each correct selection is worth one point.

A. Goal
B. Case
C. Letter
D. Social activity
E. Rollup queries

Correct Answer: B, C, D
Section:

QUESTION 4
You are configuring a single business process flow in Dynamics 365 for Customer Service.
You need to design the business process flow.
What should you do?

A. Merge peer branches to a single stage when merging branches.

B. Span the process across 10 unique entities.

C. Combine multiple conditions in a rule by using both the AND and OR operators.

D. Use 40 steps per stage.

Correct Answer: A
Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-engagement/customize/enhanceQuestions& Answers PDF P-52business-processflows-branching

QUESTION 5
Your organization plans to use Microsoft Power BI to access and analyze data in Dynamics 365 for Customer Service.
You need to configure a Power BI connection to a Dynamics 365 organization named Contoso.
Which service URL should you use?

A. https://contoso.crm.dynamics.com

B. https://disco.crm.dynamics.com/xrmservices/2011/discovery.svc

C. https://contoso.api.crm.dynamics.com/xrmservices/2011/organization.svc

D. https://disco.crm.dynamics.com/api/discovery/v9.1

Correct Answer: A
Section:

QUESTION 6
A P-L-U-S company has the following business units:
Call center
Customer service
Digital response
Escalation
The security roles have not been modified. The customer service business unit is the parent of all other business units. Each business unit has its own queues. Customer service cases are routed to the appropriate individuals by using the queues.
You need to ensure that a specific user within the customer service business unit can read all queues within the parent and child business units.
Which security role should you assign to the user?

A. Customer service manager

B. Scheduler

C. Customer service representative

D. System customizer

Correct Answer: A
Section:

QUESTION 7
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 8
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 9
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 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 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 11
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 12
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 13
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 14
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 15
You are a Dynamics 365 for Customer Service administrator creating surveys for Voice of the Customer (VoC).
You need to ensure that VoC survey responses trigger an escalation in support.
Which workflow should you use?

A. VoC – Process Survey Response
B. VoC – Close Survey Activity
C. VoC – Process NPS Response
D. VoC – Process Face Response

Correct Answer: A
Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-engagement/voice-of-customer/plansurvey

QUESTION 16
You are creating a survey using Voice of the Customer.
You need to embed the survey into a website and make it available to your customer.
What should you do?

A. Create the website. Add the URL to the Dynamics 365 site in your website.
B. Create your Dynamics 365 portal. Display the Voice of the Customer page from within the main website page.
C. Create a webpage on the website. Add the URL to link the Voice of the Customers.
D. Create an iFrame URL. Copy the HTML code to an iFrame in your website.

E. Add the iFrame URL to your website.

Correct Answer: D
Section:
Explanation:

QUESTION 17
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. Validate that customer and case title fields have not been removed as fields that child cases inherit from parent cases. Add product and case-type fields to the list. Set the closure preference setting to Don't allow parent case closure until all child cases are closed.
B. On the case entity, update the Parent case-Child case 1:N relationship field mapping to include the fields.
Create a business rule on the case entity to prevent the parent from closing if it has one or more open child cases.
C. Create a business rule.
D. Validate that customer and case title fields have not been removed as fields that child cases inherit from the parent cases. Add product and case-type fields to the list. The closure preference setting does not need to be changed. This is default behavior.

Correct Answer: A
Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-service/define-settings-parent-childcases

QUESTION 18
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. Validate that customer and case title fields have not been removed as fields that child cases inherit from parent cases. Add product and case-type fields to the list. Set the closure preference setting to Don't allow parent case closure until all child cases are closed.
B. On the case entity, update the Parent case-Child case 1:N relationship field mapping to include the fields.
Create a business rule on the case entity to prevent the parent from closing if it has one or more open child cases.
C. Create a business rule.
D. Validate that customer and case title fields have not been removed as fields that child cases inherit from the parent cases. Add product and case-type fields to the list. The closure preference setting does not need to be changed. This is default behavior.

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

QUESTION 19
A P-L-U-S company uses Dynamics 365 Customer Service.

You are configuring the advanced similarity rules. You create a similarity rule on cases and put an exact match for the Modified On field in the Match Fields tab.
You test the rule and discover that exact matches do not appear.
You need to determine why the rule is not working.
What are two possible reasons why the rule is not working? Each correct answer presents a complete solution.
NOTE: Each correct selection is worth one point.

A. A Power Automate flow was not created.
B. The similarity rule is deactivated.
C. The security role is not set to run the similarity rule.
D. The similarity rule was not published.
E. The Modified On field is not set to searchable in the customization of the case entity in the solution.

Correct Answer: B, E
Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-service/suggest-similar-cases-for-a-case

QUESTION 20
You are a help desk representative for an organization using Dynamics 365 Customer Service.
Users need to search within the system for similar cases. None of the out-of-the-box settings have been changed.
You need to determine which search features are available for use by default.
Which two search features are available? Each correct answer presents a complete solution.
NOTE: Each correct selection is worth one point.

A. Advanced Find
B. Quick Find
C. Relevance Search
D. Full-text Quick Find

Correct Answer: A, B
Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/power-platform/admin/configure-relevance-search-organization
https://docs.microsoft.com/en-us/powerapps/user/search

QUESTION 21
You are a Dynamics 365 Customer Service administrator.
You need to add a new status reason to the case entity.
What are two possible ways to accomplish the goal? Each correct answer presents a complete solution.
NOTE: Each correct selection is worth one point.

A. Navigate to Cases in the Customer Service Hub app. Open a record, edit the form, and then edit the Status reason field.
B. Modify the existing solution and the case entity. Edit the status reason and add an additional status reason value.
C. Create a new solution and add the existing Case entity. Select Status Reason and add a new value.
D. Modify the existing solution. Add another entity named Status. Then, create a status reason field with additional options.

Correct Answer: B, C
Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-service/define-status-reason-transitionscasemanagement

QUESTION 22
You set a default entitlement for a customer.
You need to ensure that the default entitlement is automatically associated with a case.
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.
B. Update the customer, contact, or product field on an existing case.
C. Update the description field on an existing case.
D. Add an activity to an existing case.

Correct Answer: A, B
Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-service/create-entitlement-definesupport-termscustomer
https://docs.microsoft.com/en-us/power-platform/admin/system-settings-dialog-box-service-tab

QUESTION 23
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 a Dynamics 365 for Customer Service system administrator for Contoso, Ltd.
You need to automatically create cases from emails sent to the support@contoso.com email address.
Solution: Create an automatic record creation and update rule. Set the Source type to Email, and then select the queue. Configure conditions for record creation.
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/customerservice/automatically-create-case-from-email

QUESTION 24
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 public 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:
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-service/set-up-queues-manage-activitiescases

QUESTION 25
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 public and add applicable members.
Set up the support queue to be private.
Does the solution meet the goal?

A. Yes
B. No

Correct Answer: A
Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-service/set-up-queues-manage-activitiescases

QUESTION 26
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 public.
Set up level1 and level2 queues to be public 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:
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-service/set-up-queues-manage-activitiescases

QUESTION 27
You are a Dynamics 365 Customer Service administrator. You are creating a customer service schedule.
You need to ensure that the schedule shows the correct time zone for available customer service hours.
What should you do?

A. Set the time zone in each customized schedule.
B. Allow the system to automatically convert to each user's time zone when a user signs in.
C. Set the time zone in Dynamics 365 personal options.
D. Set the time zone to GMT (Coordinated Universal Time) to enable conversion when you sign in.

Correct Answer: A
Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-service/create-customer-serviceschedule-definework hours

QUESTION 28
A P-L-U-S company uses Dynamics 365 Customer Service.
The schedule shows working intervals of 45 minutes. The intervals cause customer service representatives to have too much free time during working hours. The company wants to change the intervals to every 30 minutes.
You need to configure the intervals.
What should you configure?

A. Schedule with travel time and distance
B. Fulfillment preferences
C. Resource crew scheduling
D. Requirement groups
E. Schedule within time constraints

Correct Answer: B
Section:
Explanation:
Reference:

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

QUESTION 29
You are helping A P-L-U-S company implement Power Virtual Agents with Omnichannel for Customer Service.
The company has a chatbot that escalates to a manager if a customer wants to escalate from a chatbot.
You need to configure a prerequisite before you can implement the chatbot.
Which prerequisite should you configure?

A. Configure context variables for a chatbot.
B. Create one chatbot in one queue with a human having a higher capacity over the chatbot.
C. Create one chatbot in one queue with the chatbot having the highest capacity over human capacity.
D. Configure a Microsoft Teams support channel for the chatbot.
E. Configure an SMS channel for a chatbot.

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

QUESTION 30
A P-L-U-S company is implementing Omnichannel for Customer Service.
The company separates agents into teams for billing, new product inquiries, support, and warranty.
The new product team currently handles text messages, emails, and live chats from the company website.
The company plans to release a new product. Before the new product launch, the company wants to add the ability to manage conversations coming in from Facebook and Twitter.
You need to configure the system with the least amount of effort.
What should you do?

A. Create a new resource characteristic.
B. Create a routing rule.
C. Create a new work stream for each channel.
D. Add the new channel to the existing work stream.

Correct Answer: D
Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-service/create-workstreams

QUESTION 31
You are a Dynamics 365 Customer Service administrator.
You are configuring a case dashboard.
You need to filter the dashboard to show only escalated cases and cases that are marked as Request.
Which filter should you use?

A. Timeframe
B. Priority
C. Global

D. Visual

Correct Answer: C
Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-service/customer-service-hub-user-guidedashboard

QUESTION 32
You are implementing Dynamics 365 Customer Service Insights.
The product manager would like to see product sales trends by age group. The groupings are as follows:
Ages 18 and younger
Ages 19-25
Ages 26-40
Ages 41-55
Ages 56 and older
You need to configure the system.
What should you define?

A. activity
B. measure
C. segment
D. member

Correct Answer: B
Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-insights/audience-insights/measures

QUESTION 33
A customer needs to know how data from third-party applications can be reported on in a Customer Service Insights dashboard.
You need to advise the customer on how to display the data.
What should the customer use?

A. lead and opportunity data from Common Data Service
B. call intelligence data from Common Data Service
C. ding web search for data creation data in Common Data Service
D. data integration data maps With Common Data Service

Correct Answer: D
Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/ai/customer-service-insights/use-external-datasources

QUESTION 34
You are implementing a help desk system that enables users to submit cases by using telephone or email.
You need to ensure that cases are classified correctly.

What should you do?

A. Configure relevance search
B. Configure categorized search
C. Create security roles by support function. Assign the security role to users.
D. Modify' the subject tree.

Correct Answer: D
Section:
Explanation:
Define subjects to categorize cases, products, and articles.
To edit a subject, in the Subject Tree, select a subject, and then under Common Tasks select Edit Selected Subject.
Reference:
https://docs.microsoft.com/en-us/power-platform/admin/define-subjects-categorize-casesproducts-articles

QUESTION 35
You are a Dynamics 365 Customer Service administrator. Emails are automatically converted to cases.
Users report that emails are no longer being converted to cases.
What is the possible cause?

A. The Dynamics Flow process is not running.
B. Your user ID does not have permission to run the process effectively.
C. The workflow process has been deactivated.
D. The solution has not been published.

Correct Answer: C
Section:
Explanation:
When a case creation rule is activated, a corresponding workflow is created automatically. If you create or assign a rule, you must have permissions to perform the same action on workflows. The case creation rule is applied and a case is created in context to the permissions that the owner of the case creation rule has.
Note: A workflow can only be activated or deactivated by the workflow owner or by someone with the Act on Behalf of Another User privilege such as the system administrator.
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-service/automatically-create-case-fromemail

QUESTION 36
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.
A P-L-U-S company uses Dynamics 365 Customer Service Hub.
Customer service representatives must be able to perform a relevance search on name, phone number, email, and queue.
A customer service representative is not able to perform a relevance search for emails.
You need to ensure that the customer service representative can perform relevance searches for email addresses.
Solution: Configure interactive experience global filter.
Does the solution meet the goal?

A. Yes
B. No

Correct Answer: B
Section:

QUESTION 37
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.
A P-L-U-S company uses Dynamics 365 Customer Service Hub.
Customer service representatives must be able to perform a relevance search on name, phone number, email, and queue.
A customer service representative is not able to perform a relevance search for emails.
You need to ensure that the customer service representative can perform relevance searches for email addresses.
Solution: Enable the customization to include Knowledge Management.
Does the solution meet the goal?

A. Yes
B. No

Correct Answer: B
Section:

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 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.
A P-L-U-S company uses Dynamics 365 Customer Service Hub.
Customer service representatives must be able to perform a relevance search on name, phone number, email, and queue.
A customer service representative is not able to perform a relevance search for emails.
You need to ensure that the customer service representative can perform relevance searches for email addresses.
Solution: Enable smart matching.
Does the solution meet the goal?

A. Yes
B. No

Correct Answer: B
Section:

QUESTION 39
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 40
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 41
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 42
A trucking company uses a custom table named Leased Truck in Dynamics 365 Customer Service to capture leasing details. The company is implementing Connected Customer Service for Azure IoT Hub to track the leased trucks.
You need to configure the custom table Leased Truck for IoT integration.

Which two methods achieve the goal? Each correct answer presents a complete solution.
NOTE: Each correct selection is worth one point.

A. Set the relationship in the Power Platform admin center.
B. Create a one-to-many relationship from the Leased Truck table to the loT Alert table.
C. Call the loT - Register Custom Entity action to associate a Leased Truck record with an existing loT device.
D. Enable connections to the Leased Truck table.

Correct Answer: C, D
Section:
Explanation:
IOT enabling an entity type
Dynamics 365 entities can be associated to IoT entities so that within Dynamics 365 they can participate in IoT-related business processes and analyses. There are two methods of "IoT enabling" a Dynamics 365 entity; you can:
* (D) Programmatically form an association through the standard Dynamics 365 Connection entities capability. You can alternatively accomplish this same association through the administration UI; for more information, see Create connections to view relationships between records.
* (C) Call the IoT – Register Custom Entity action to associate an entity with an existing or new IoT Device.
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-service/cs-iot-extend-connectedcustomer-service-solutions

QUESTION 43
A GOV company administrator is setting up Dynamics 365 Omnichannel for Customer Service.
The administrator is unable to complete the setup due to insufficient permissions.
You need to ensure that the administrator can complete the setup.
Which three security settings should you assign to the administrator? Each correct answer presents part of the solution.
NOTE: Each correct selection is worth one point.

A. Dynamics 365 System Administrator
B. Power Platform Admin role
C. Read access to the Client Access License
D. Dynamics 365 Global Administrator
E. -write access to the Client Access License

Correct Answer: A, C, D
Section:

QUESTION 44
You manage a Dynamics 365 Customer Service environment. The company processes thousands of cases daily. Some cases are parent cases, but most are child cases. When a child case is created, users report that they must re-enter information in fields from the parent case.
You need to ensure that, when a new child case is created from within the context of a parent case, information in specific fields from the parent case is passed to the child case fields.
What should you do?

A. Create a many-to-many relationship and update the data mapping.
B. Use a business rule.
C. Update the attributes that the child case will inherit from the parent case.
D. Create a routing rule.

Correct Answer: C

Section:

QUESTION 45
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:

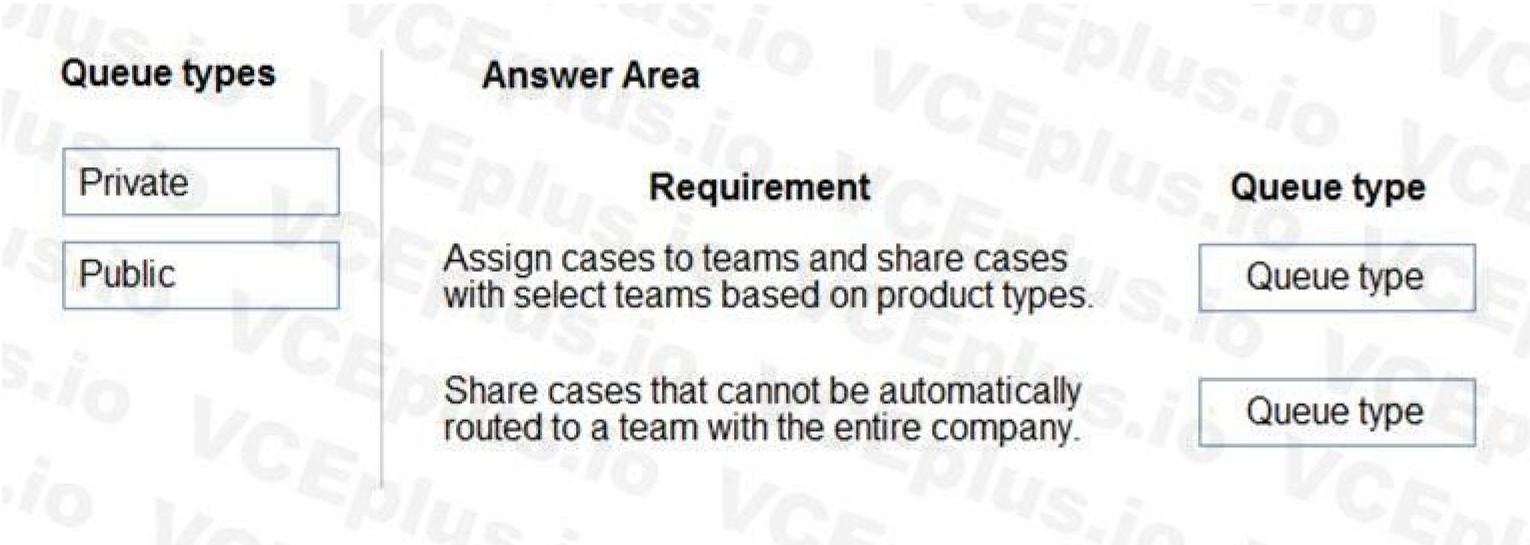
QUESTION 46
A GOV company uses Dynamics 365 Customer Service.
Telemetry on agent case resolution time reveals that agents spend 20 minutes on average resolving cases. Analysis determines that resolution duration is increased because agents are often required to view and modify data on the related account.
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.

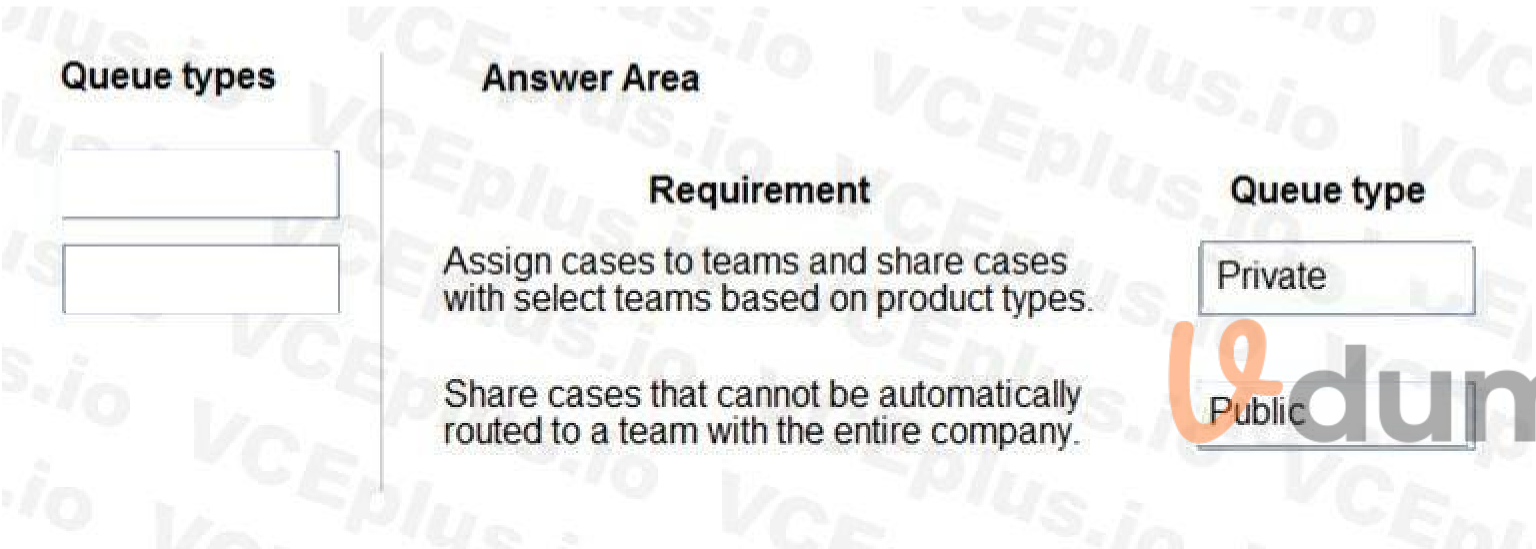
Correct Answer: D
Section:

QUESTION 47
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:



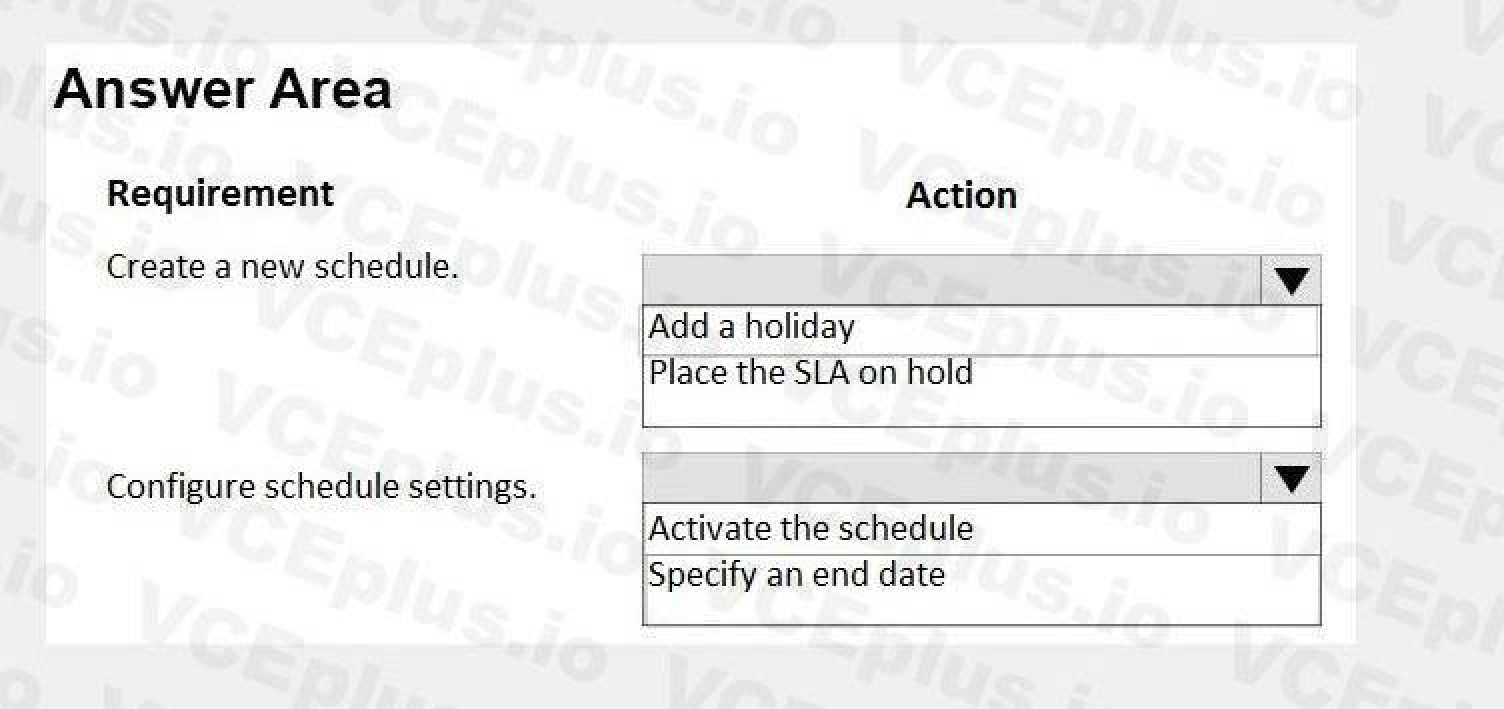
Correct Answer:



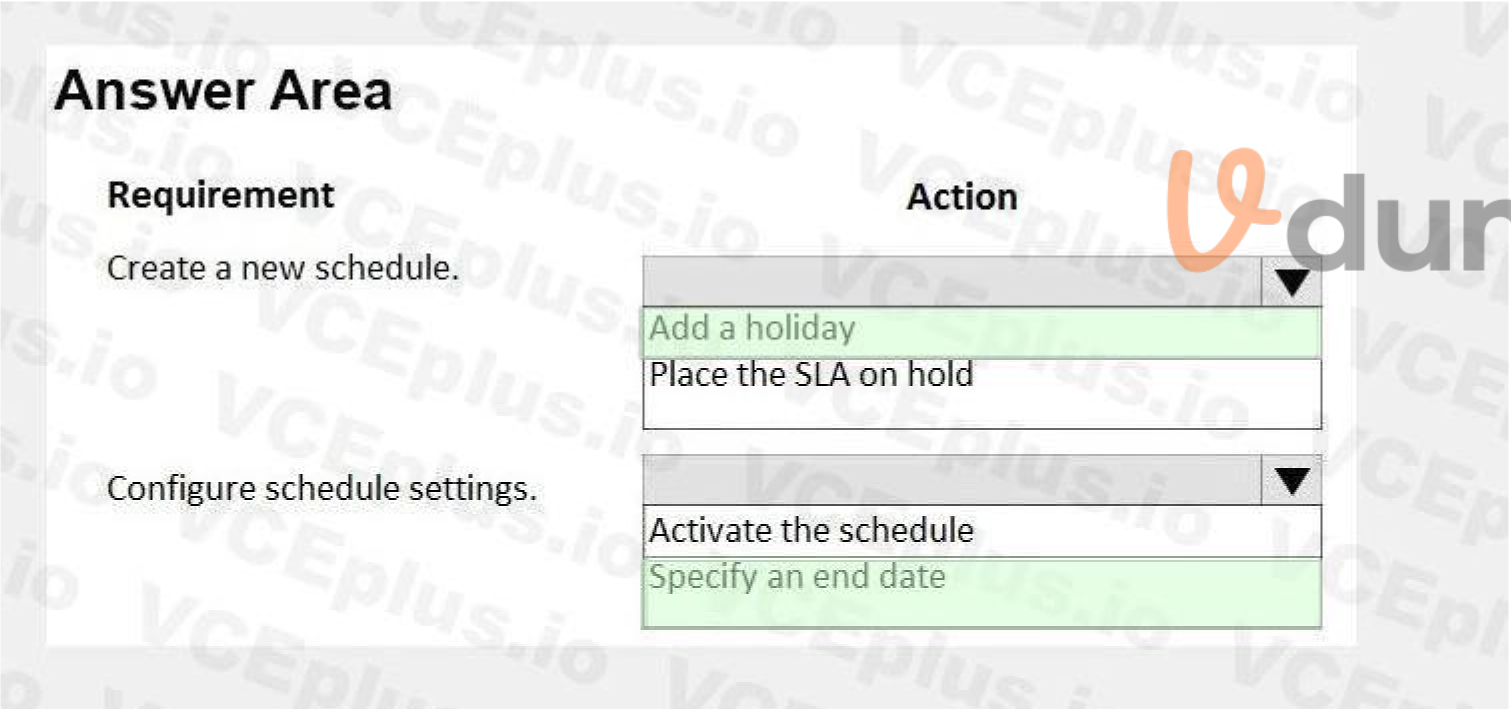
Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-service/set-up-queues-manage-activities-cases

QUESTION 48
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:



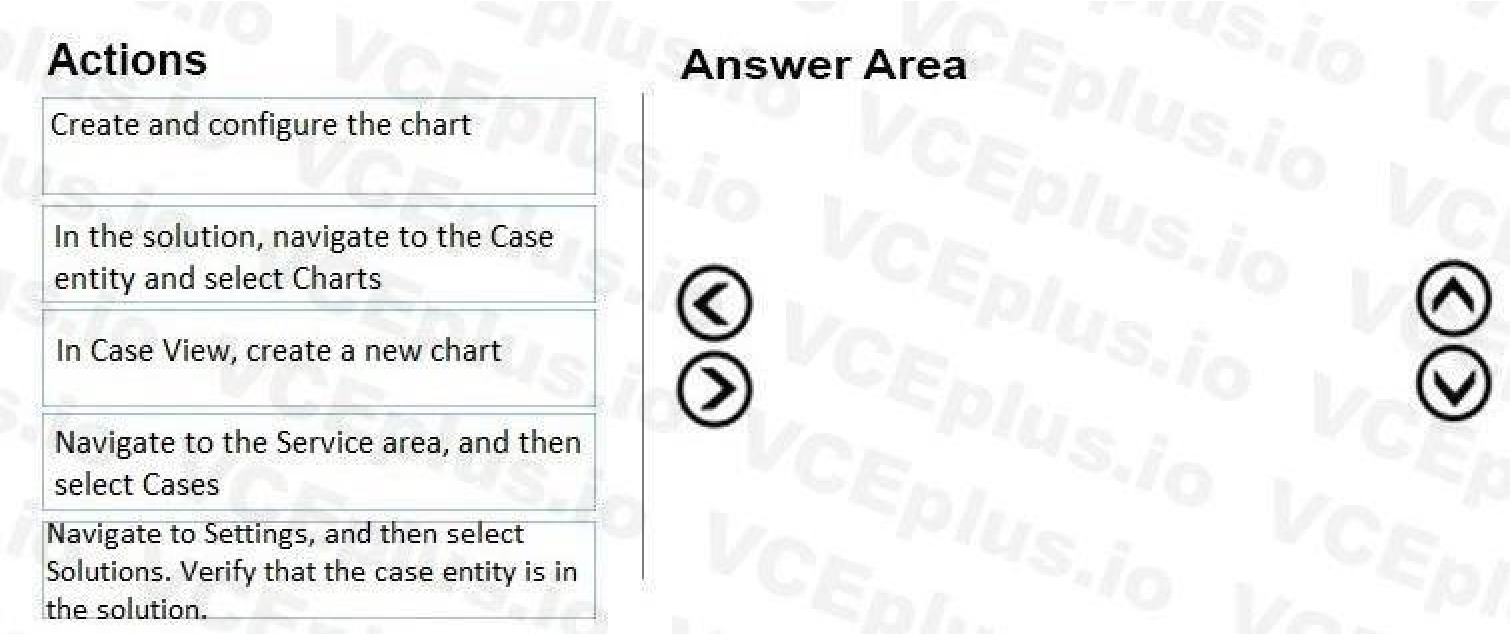
Answer Area:



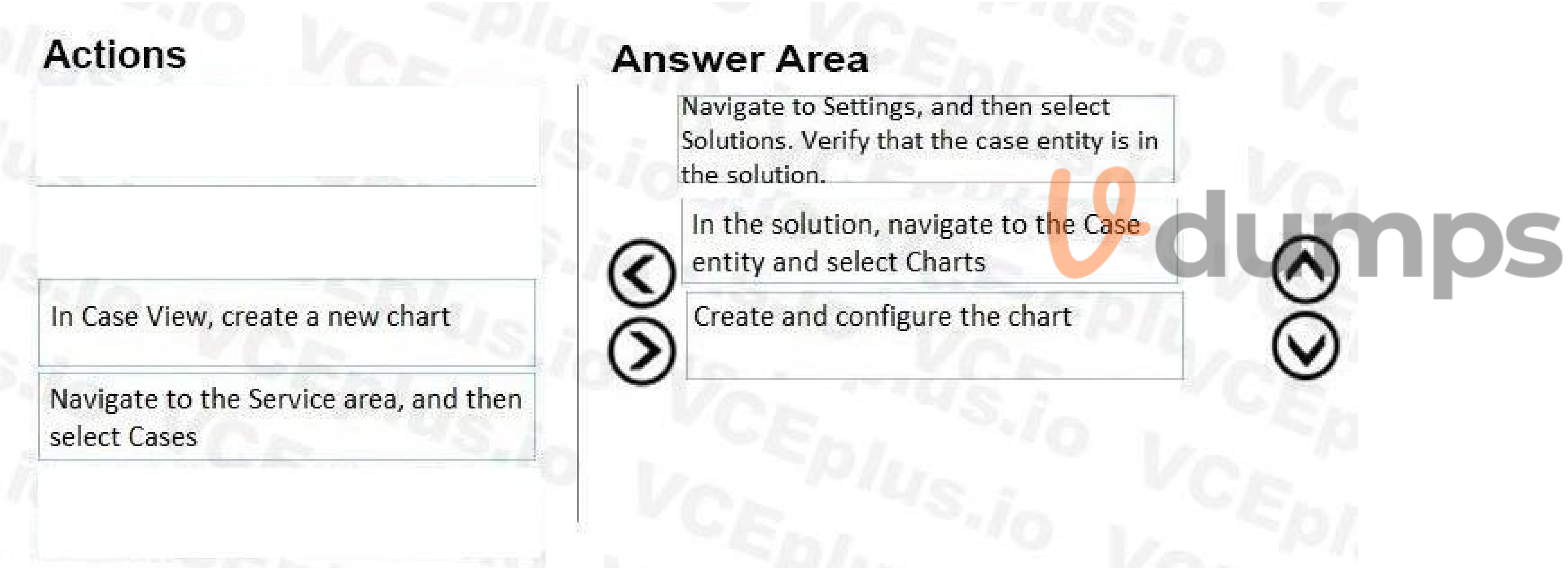
Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-engagement/customer-service/set-up-holiday-schedule

QUESTION 49
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:



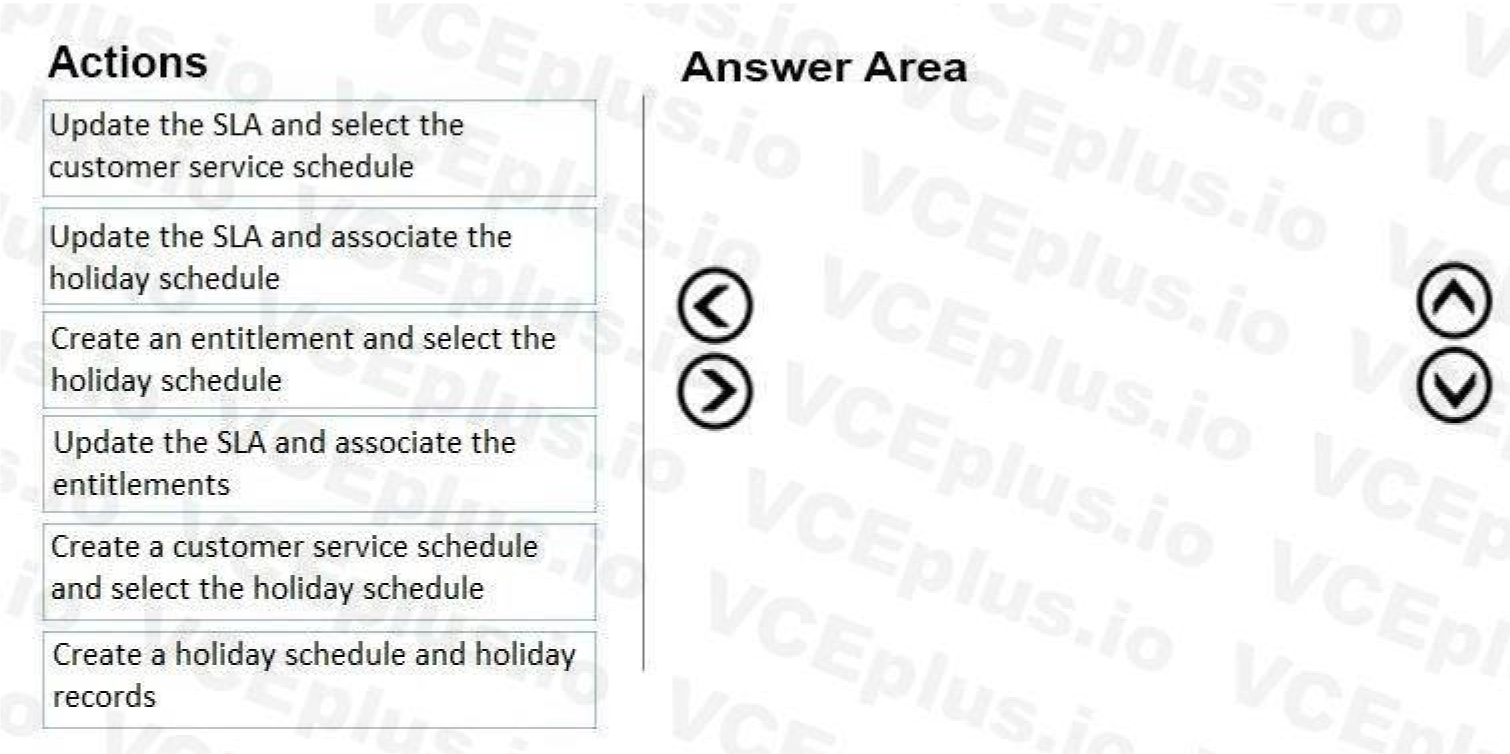
Correct Answer:



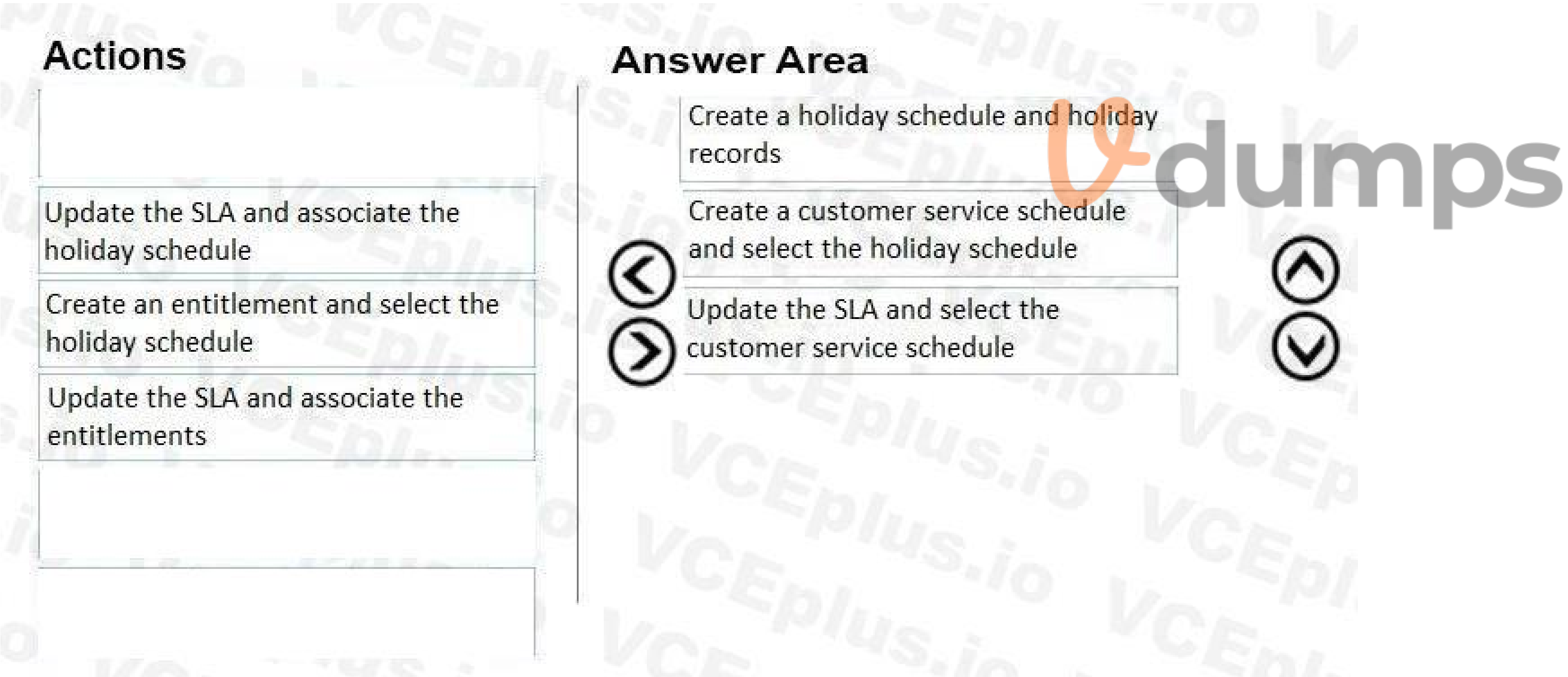
Section:
Explanation:

QUESTION 50
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:

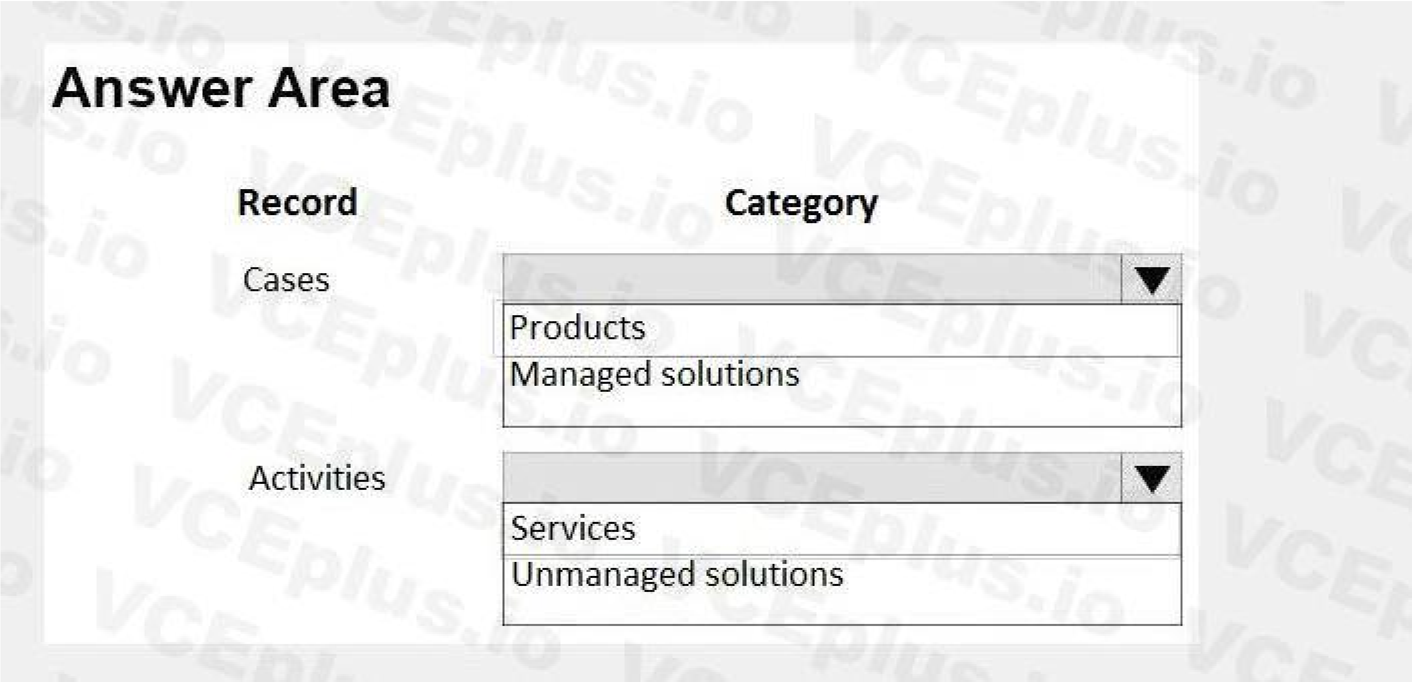


Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-engagement/customer-service/create-customer-service-schedule-define-work-hours

QUESTION 51
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:



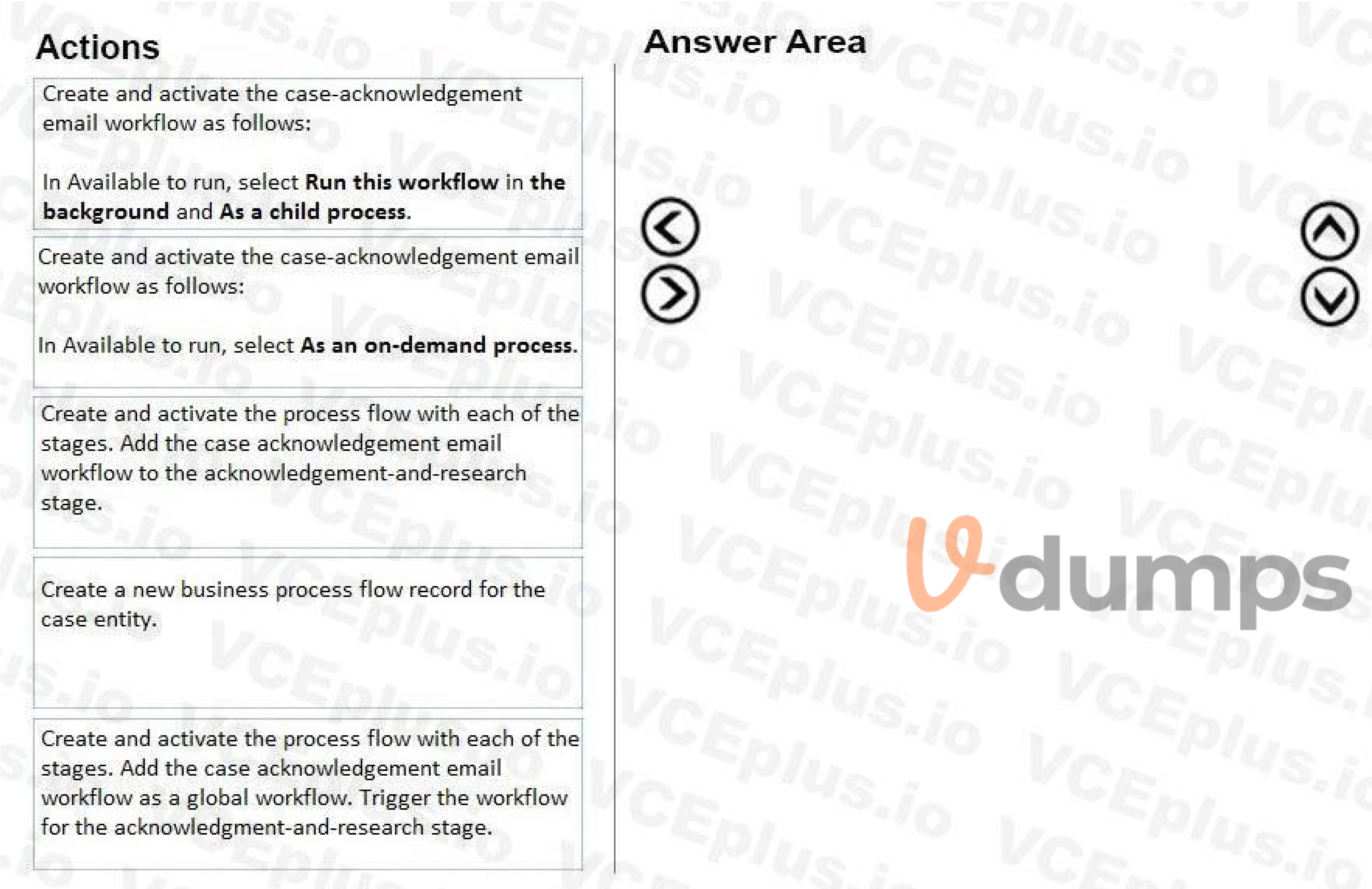
Answer Area:

Section:
Explanation:

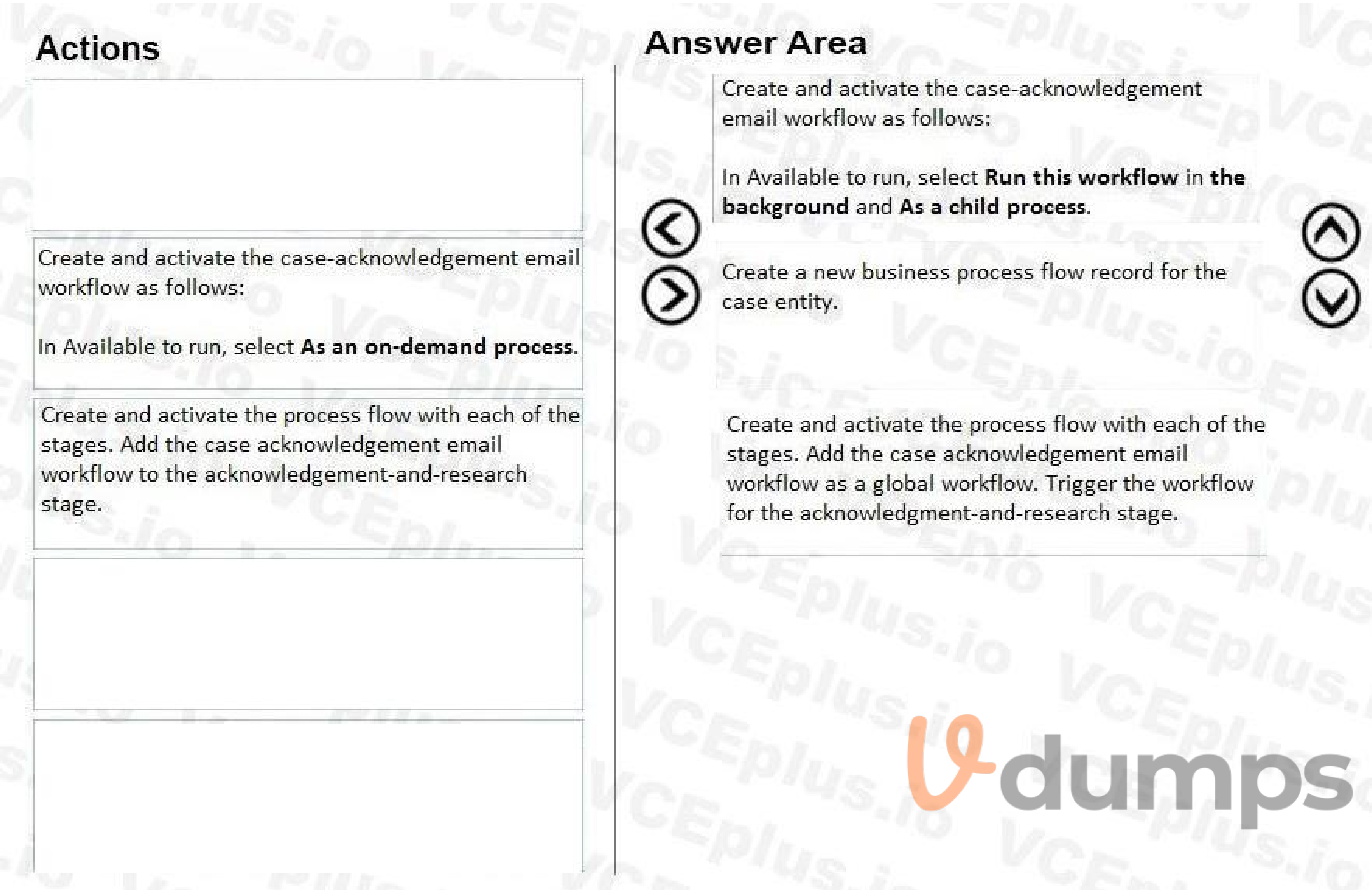
QUESTION 52
DRAG DROP
You are a Dynamics 365 for Customer Service administrator.
Your company requires a new phone-to-case business process flow for customer service representatives to follow.
The stages are as follows:
1. Verification
2. Acknowledgement and research

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:



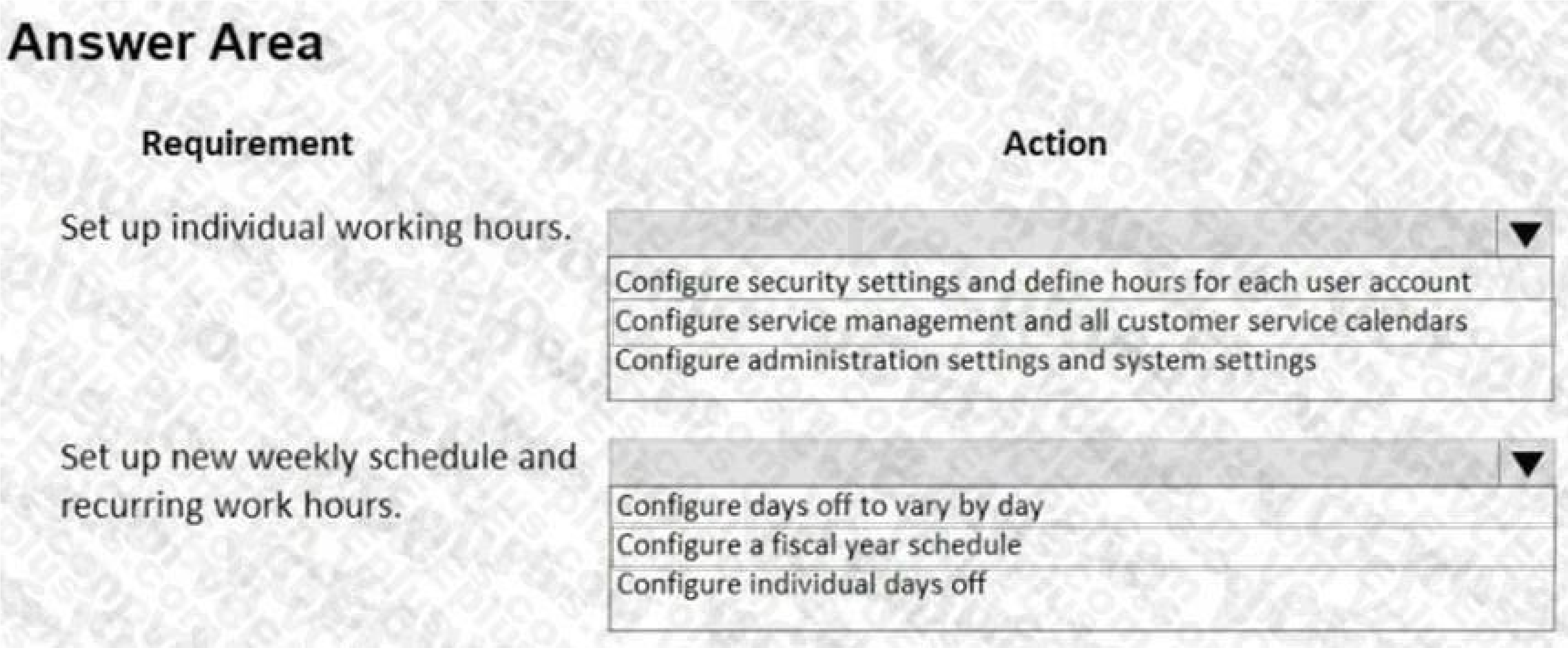
Correct Answer:



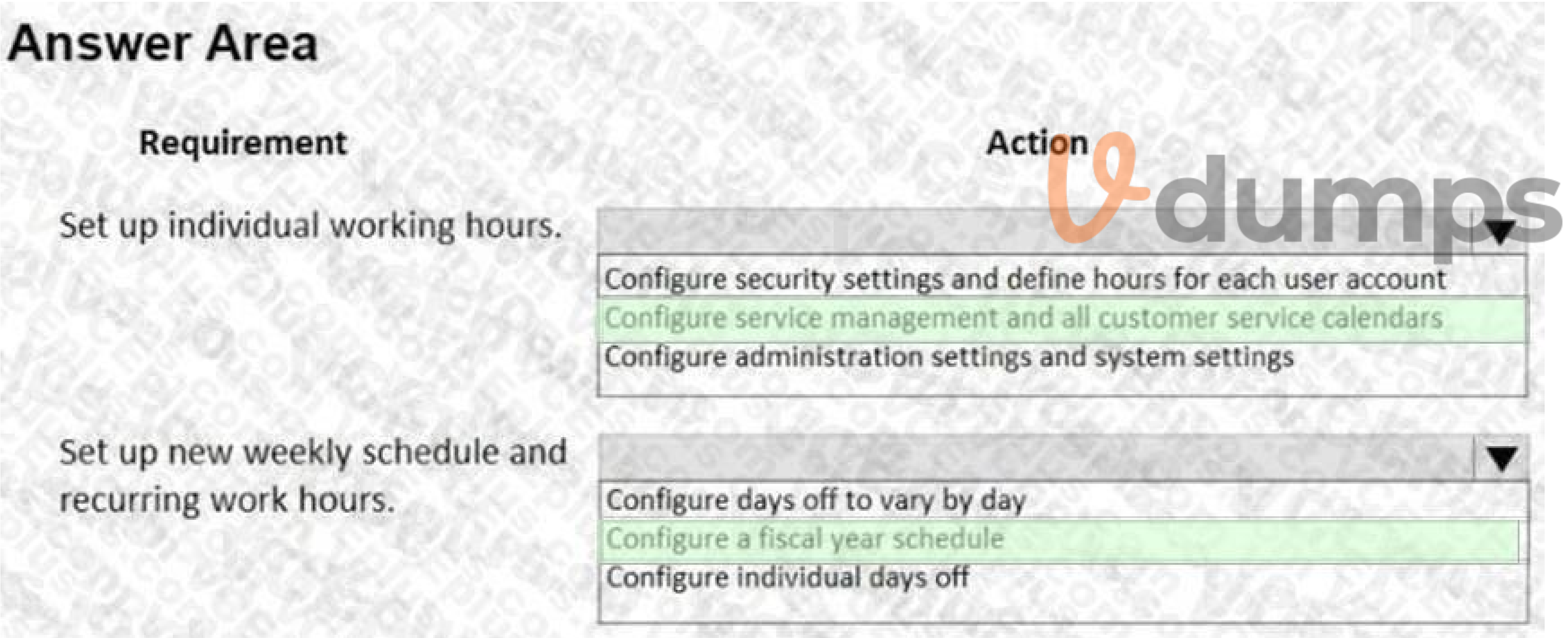
Section:
Explanation:
References:
https://docs.microsoft.com/en-us/dynamics365/customer-engagement/customize/create-business-process-flow
https://docs.microsoft.com/en-us/dynamics365/customer-engagement/customize/workflow-processes

QUESTION 53
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:

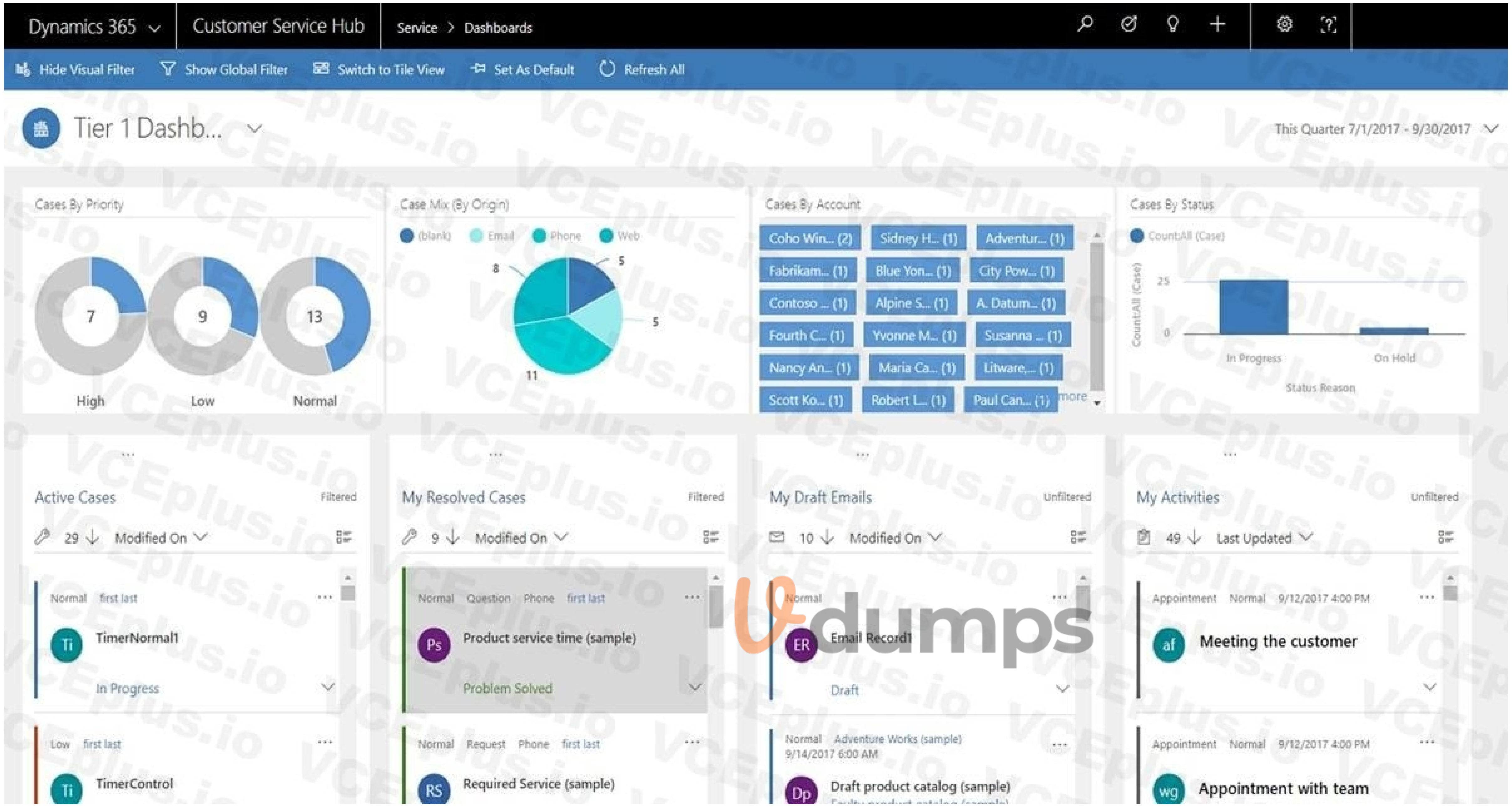


Answer Area:



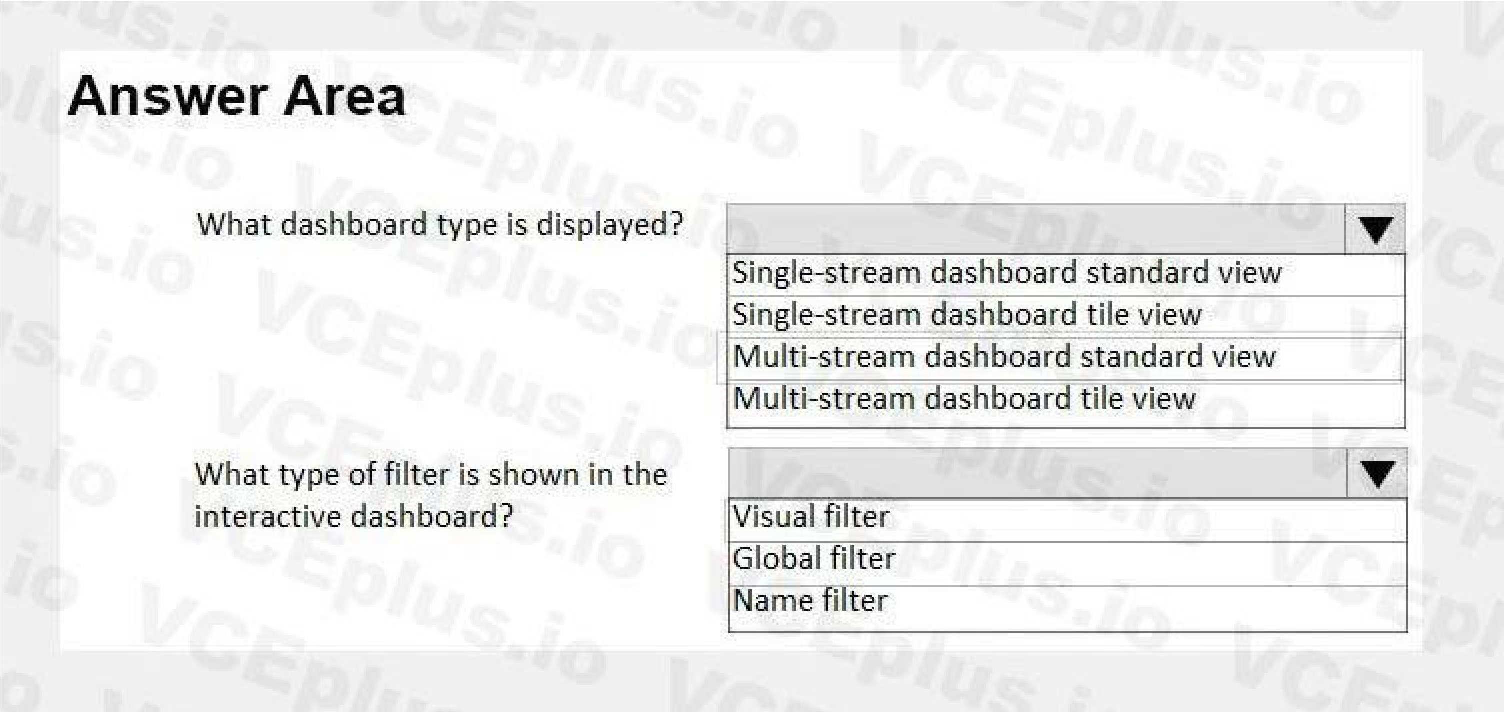
Section:
Explanation:

QUESTION 54
HOTSPOT
You view the interactive dashboard in the Microsoft Dynamics 365 Customer Service Hub.

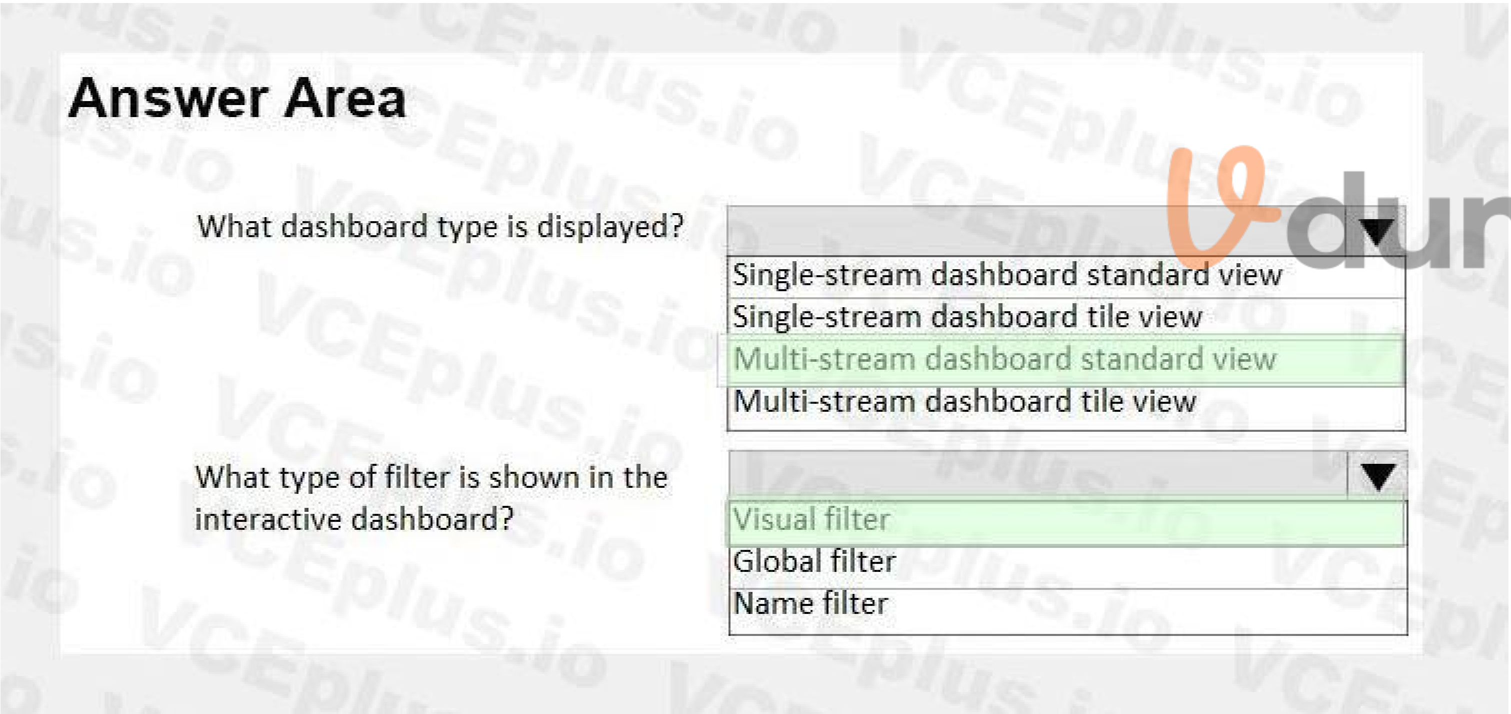


Use the drop-down menus to select the answer choice that answers each question based on the information presented in the graphic.
NOTE: Each correct selection is worth one point.

Hot Area:



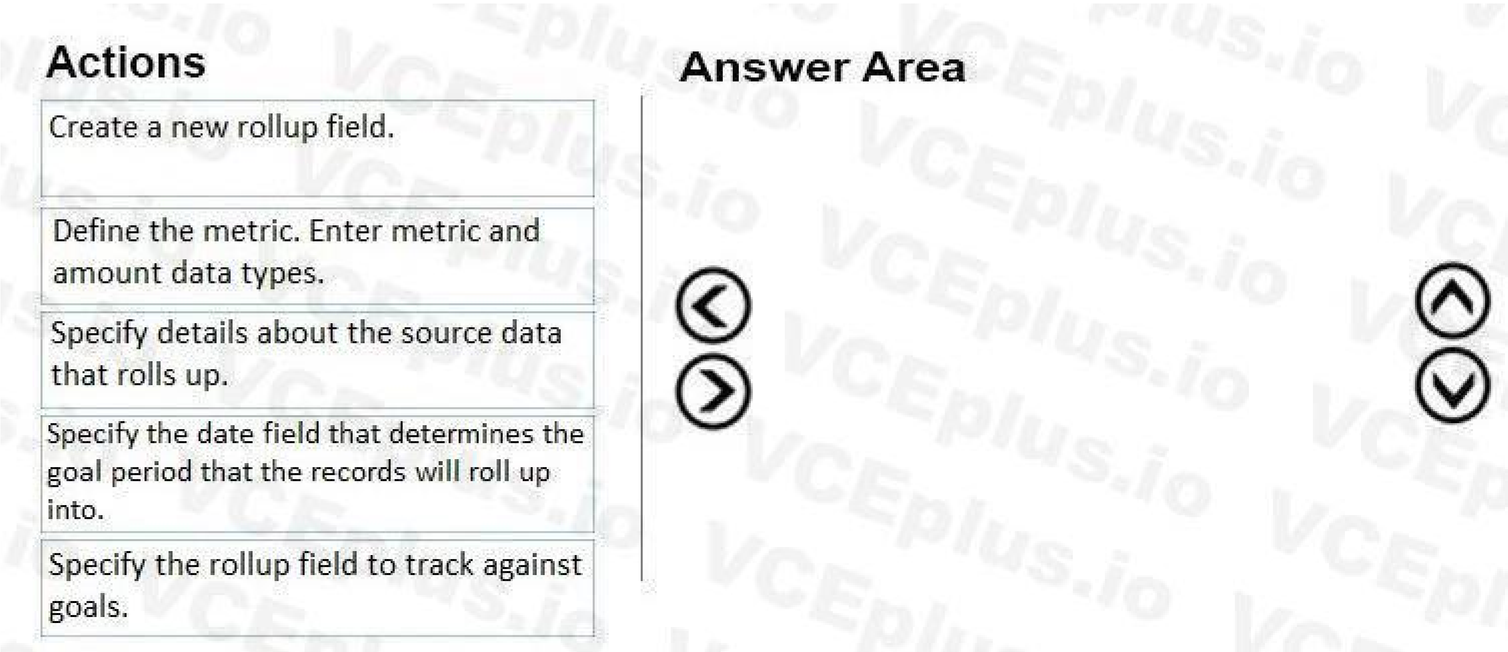
Answer Area:



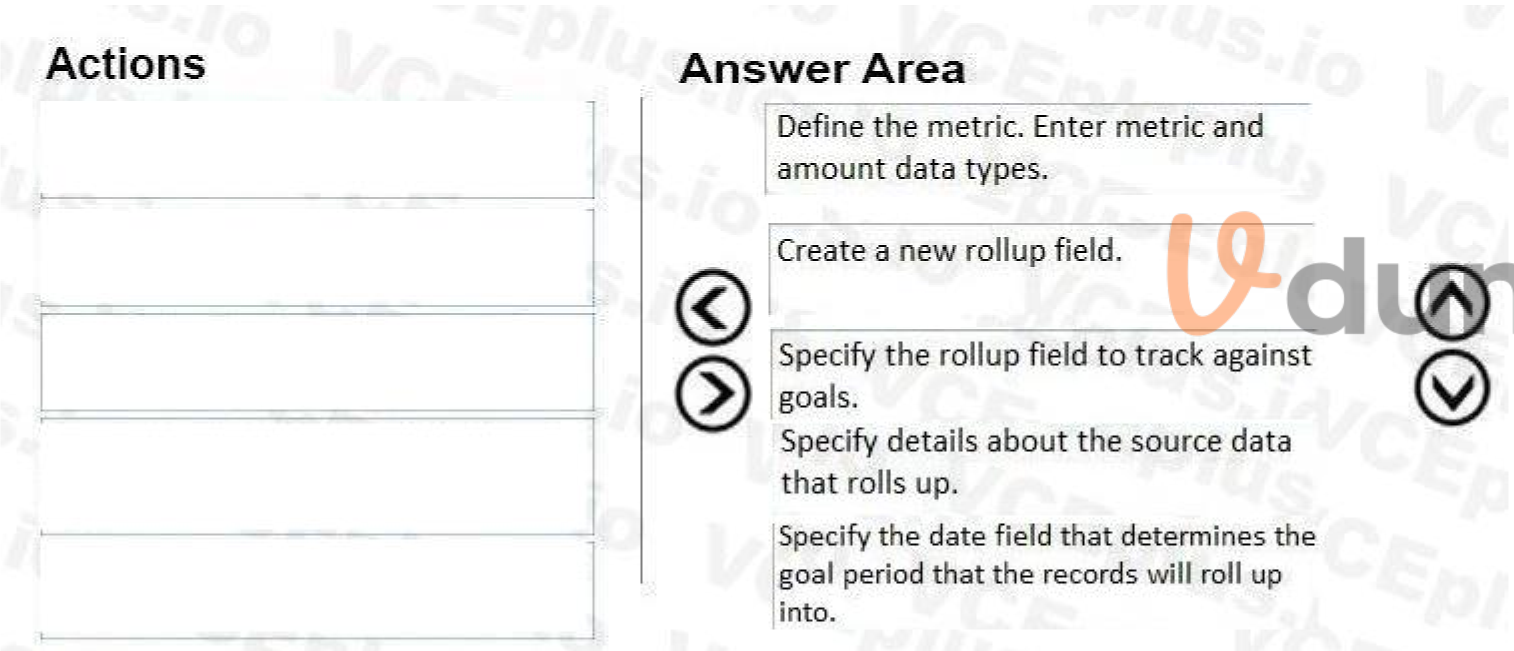
Section:
Explanation:

QUESTION 55
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:



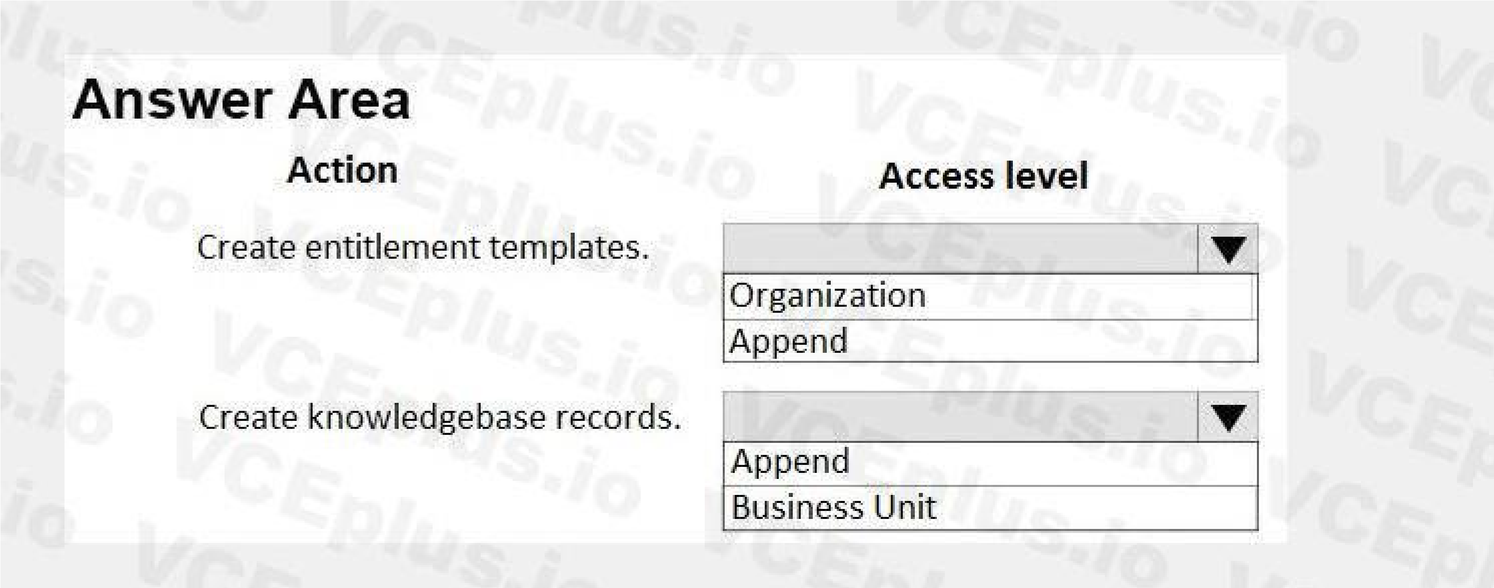
Correct Answer:



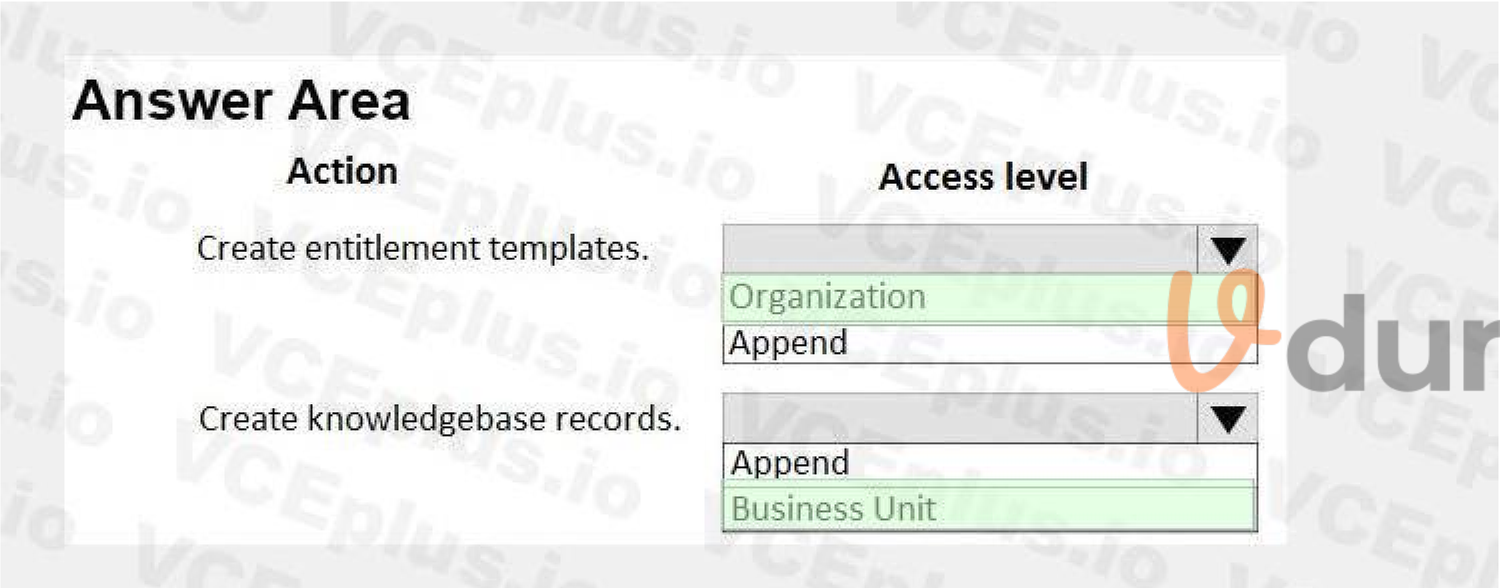
Section:
Explanation:
References:
https://docs.microsoft.com/en-us/dynamics365/customer-engagement/sales-enterprise/create-edit-goal-metric

QUESTION 56
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:



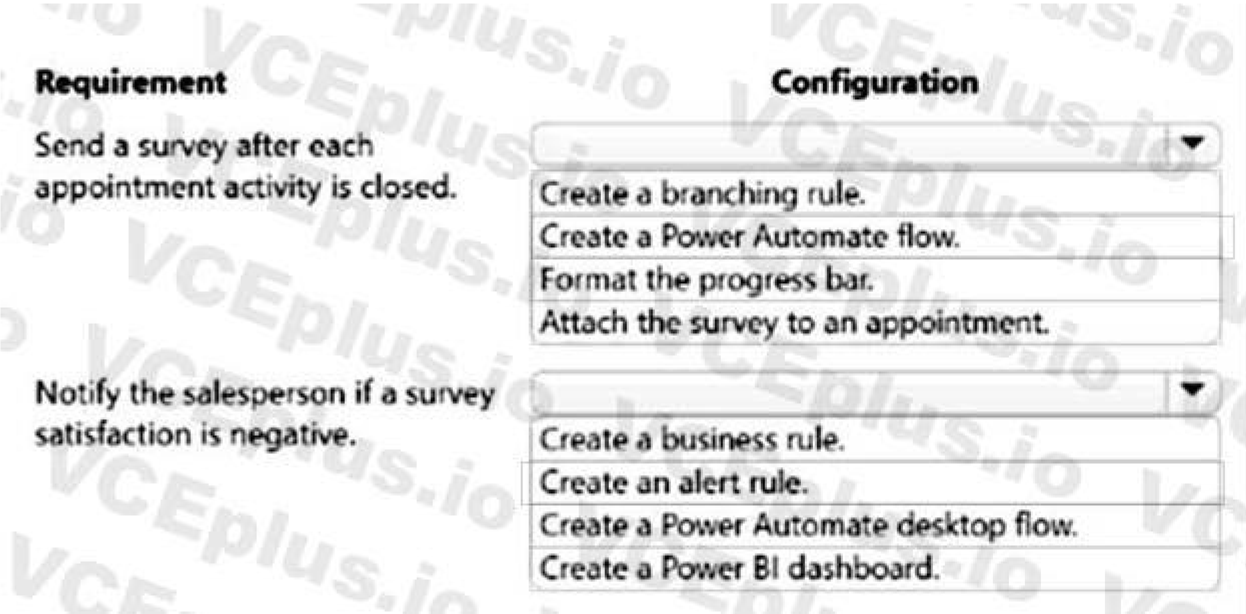
Answer Area:



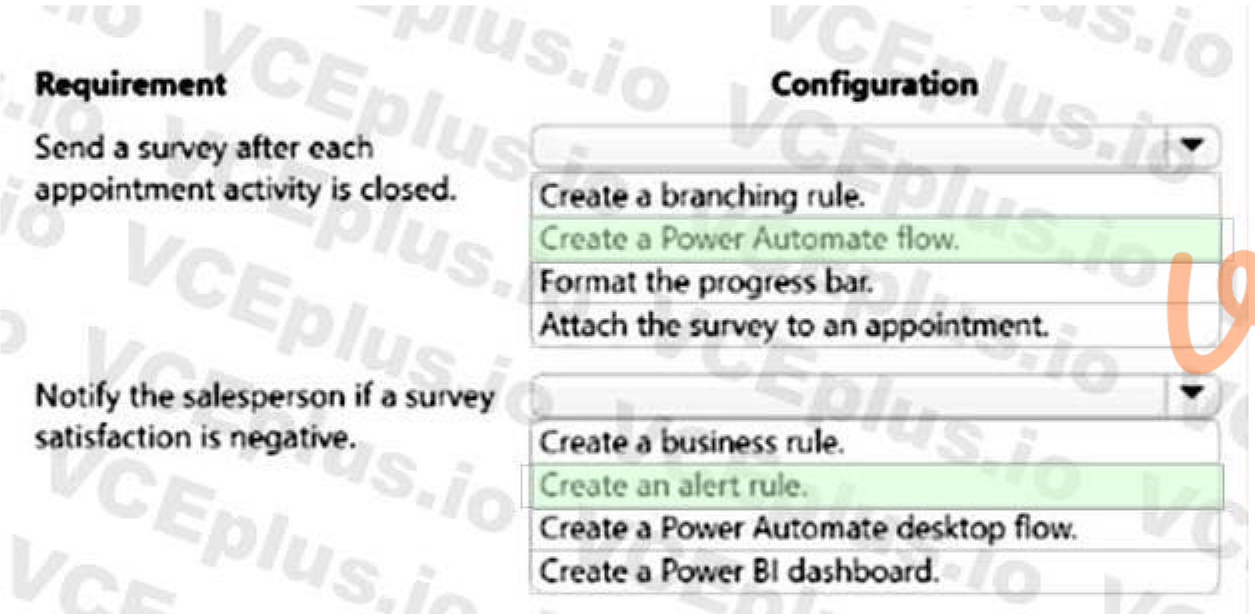
Section:
Explanation:

QUESTION 57
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 58
DRAG DROP

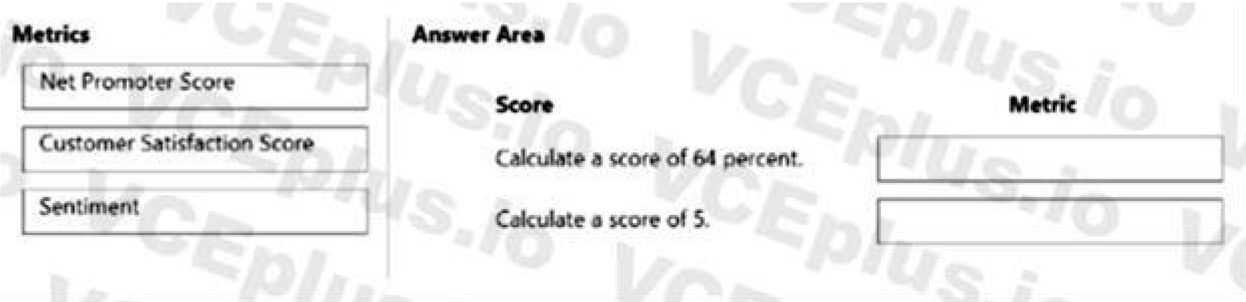
A GOV company implements Dynamics 365 Customer Voice. The company sends out customer satisfaction surveys. The service team creates one survey from a blank project and others from a predefined project template. When the company receives all the survey responses, a member of the service team must analyze 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.

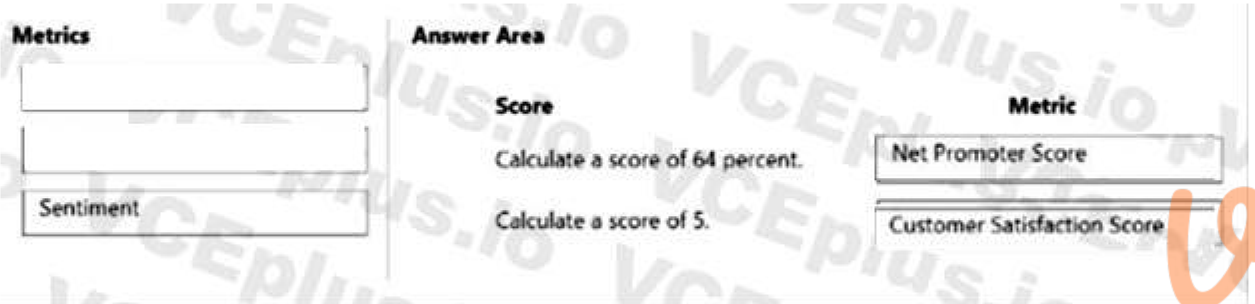
Which metrics should you use? To answer, drag the appropriate metrics to the correct scores. Each metric may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

Select and Place:



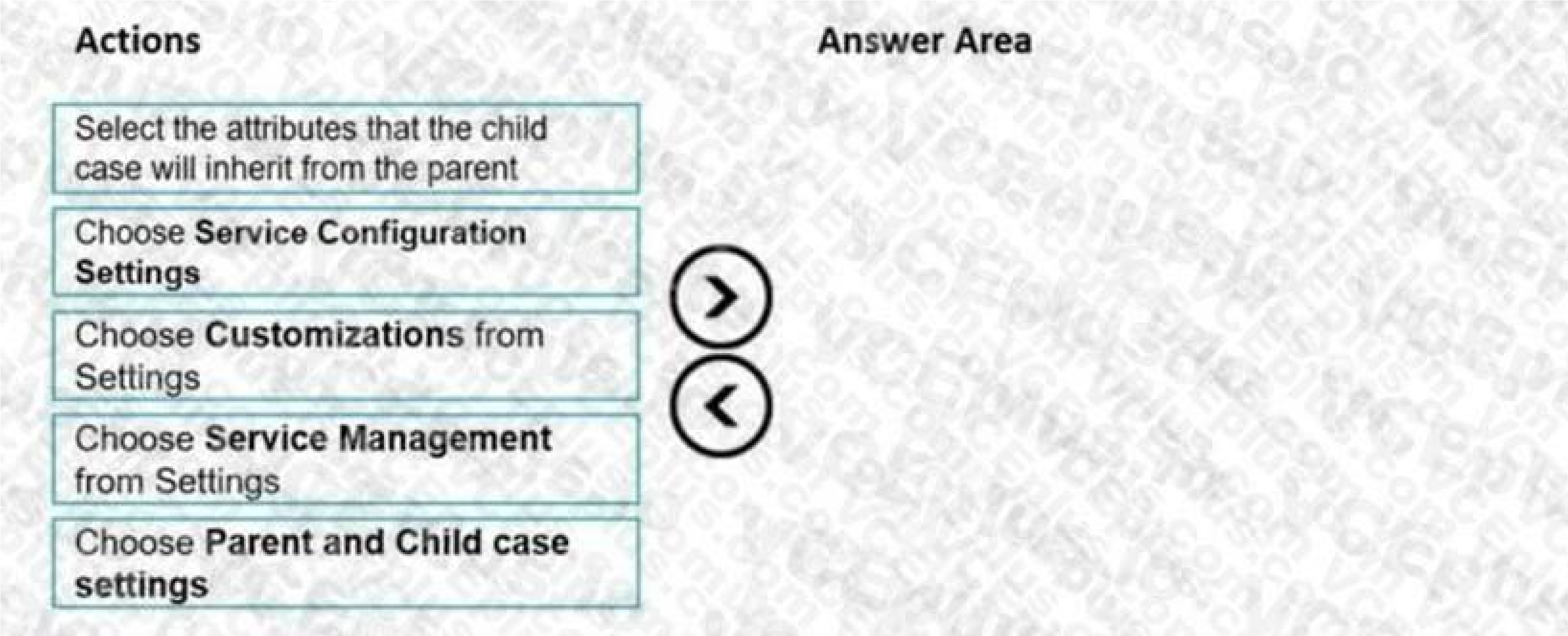
Correct Answer:



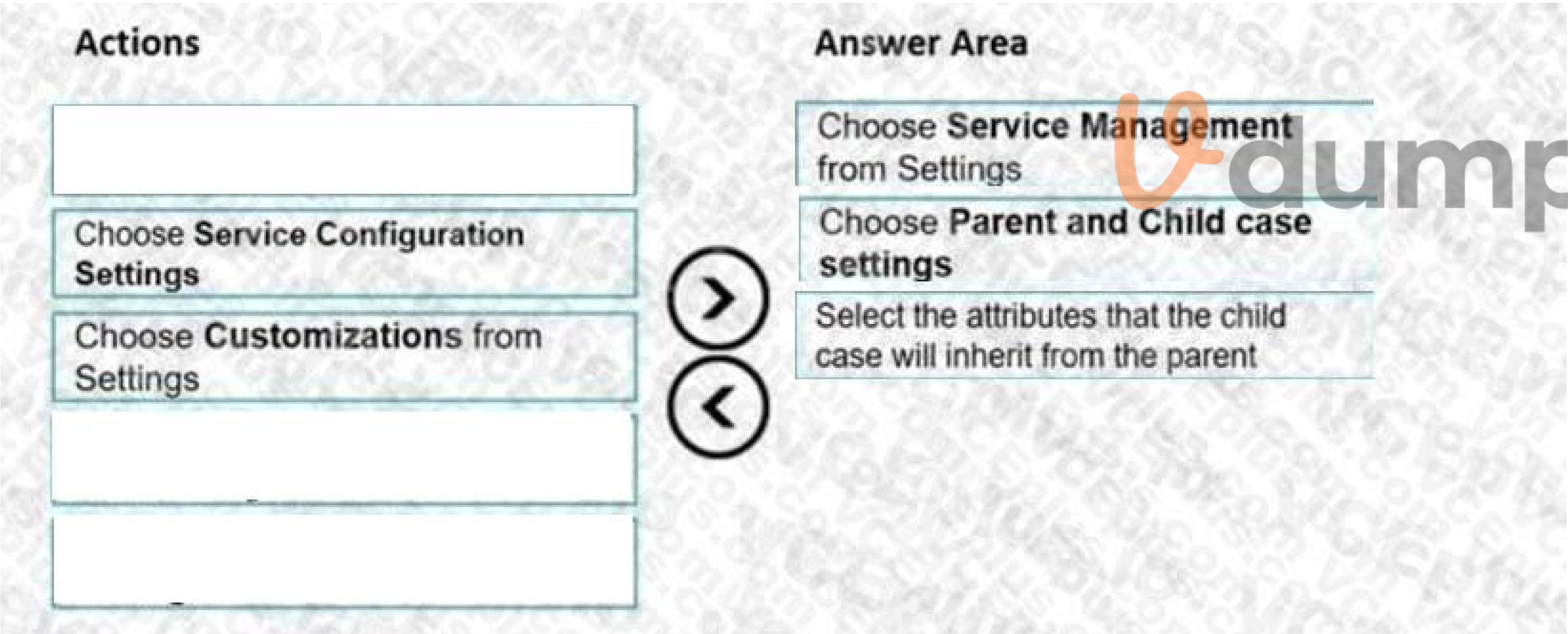
Section:
Explanation:
Box 1: Net Promoter Score
Net Promoter Score (NPS): NPS is a metric used to measure customer loyalty. The score is calculated from the NPS-type question by using a scale from 0 through 10. The respondents are grouped as follows:
Detractors are those who respond with a score from 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 59
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:

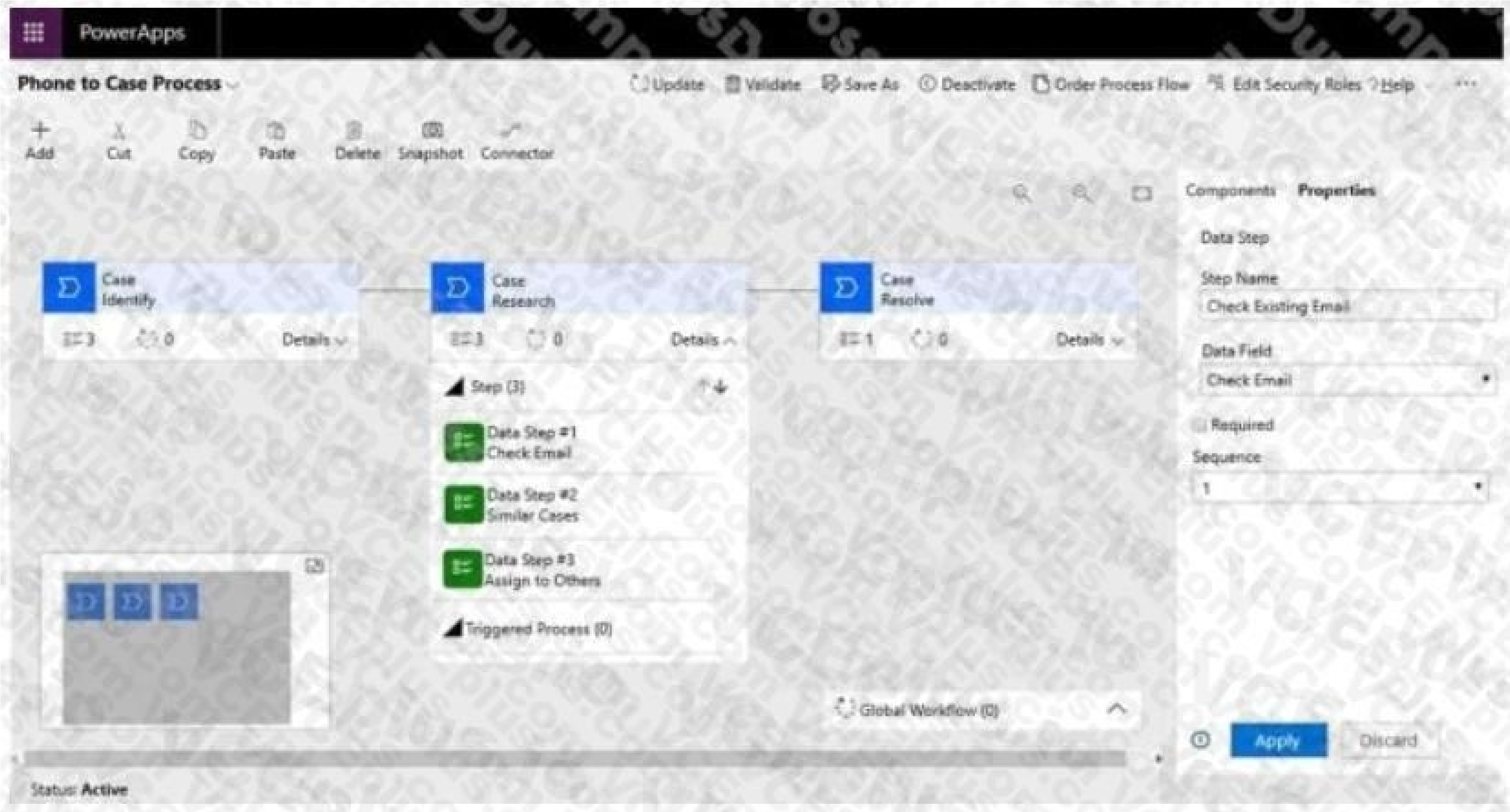
Reference:

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

QUESTION 60

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.)



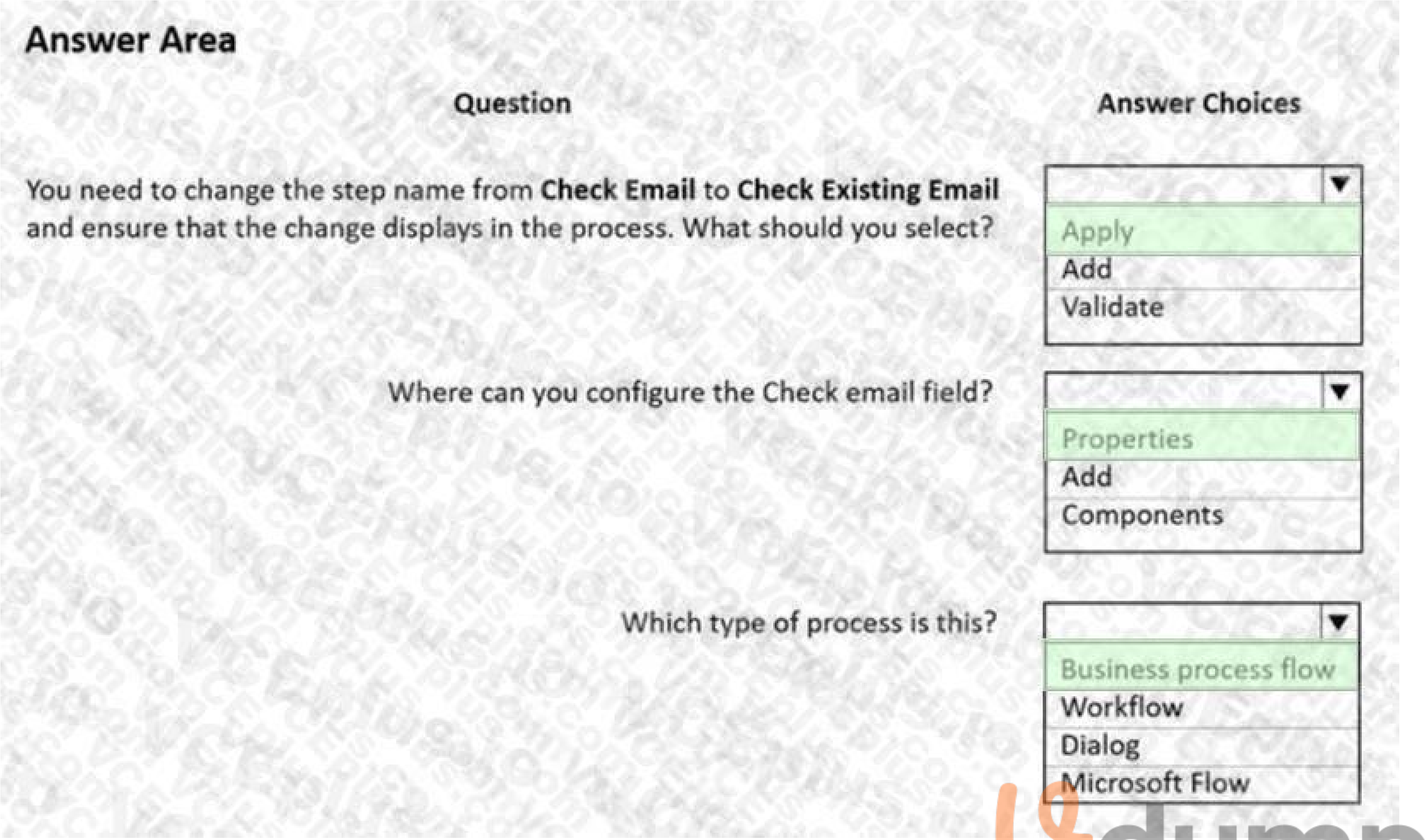
You must modify the business process flow to include the check-email step at the beginning of the research stage.
Use the drop-down menus to select the answer choice that answers each question based on the information presented in the graphic.
NOTE: Each correct selection is worth one point.

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

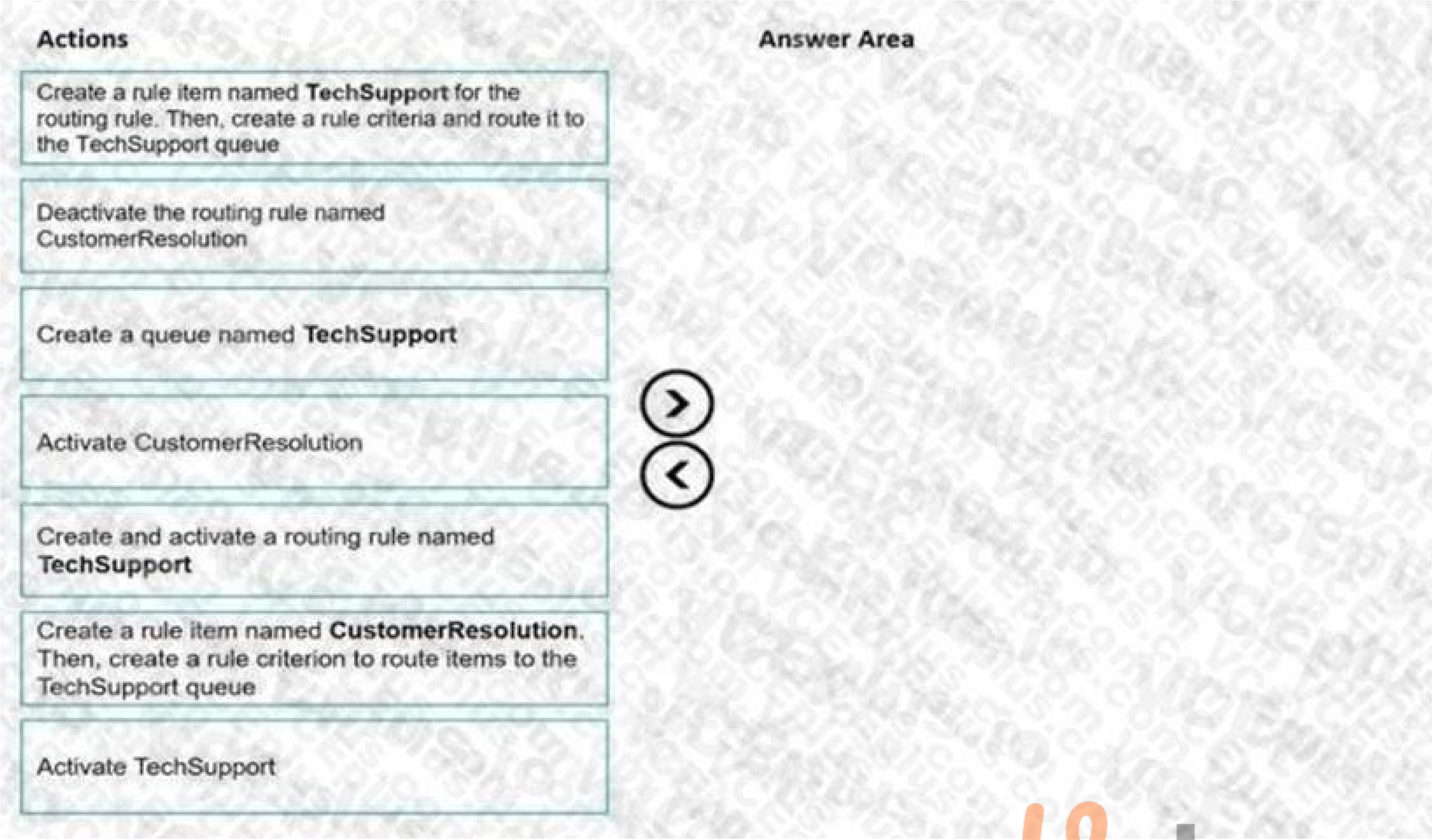
Answer Area:



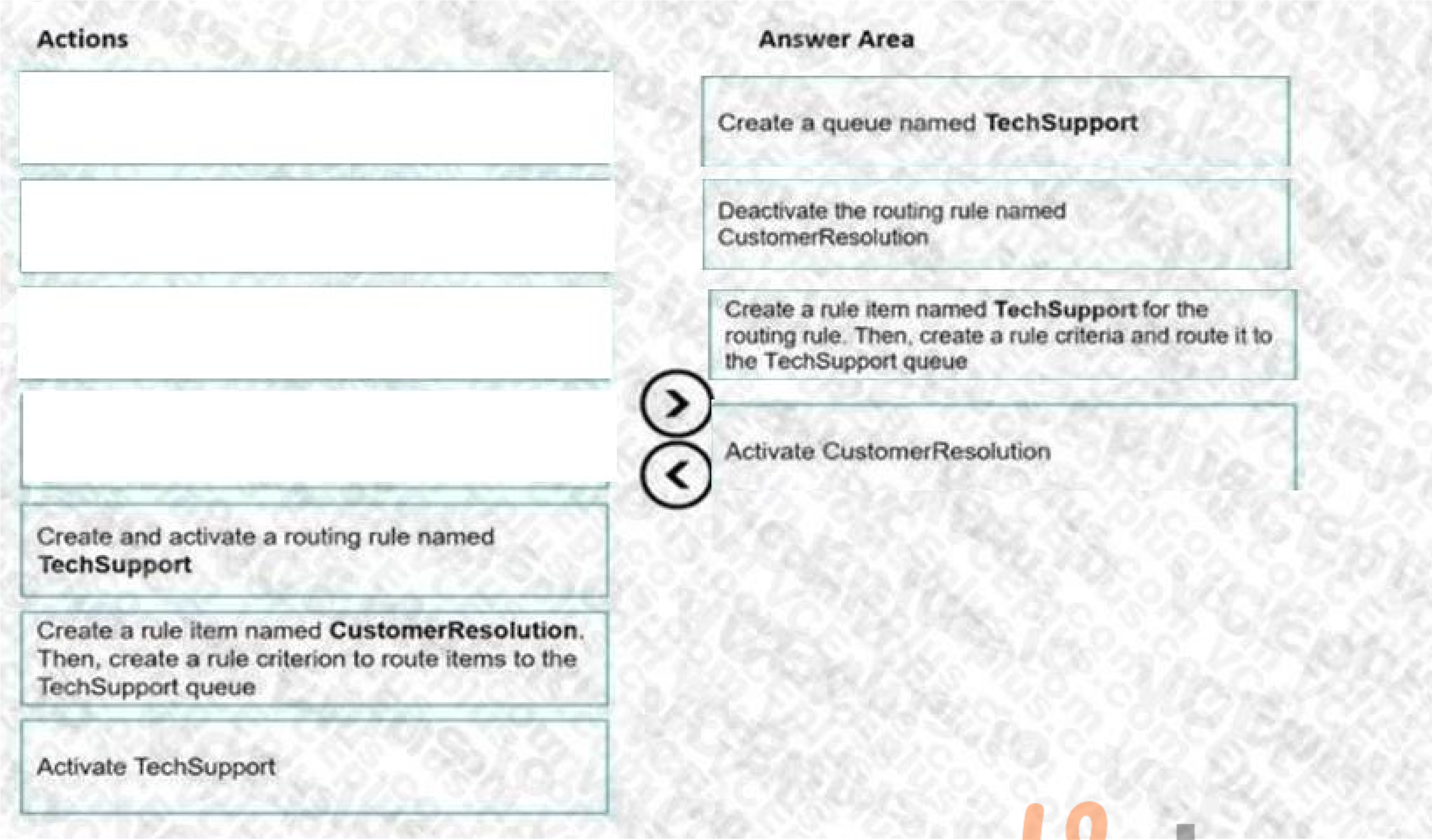
Section:
Explanation:
Reference: https://docs.microsoft.com/en-us/power-automate/create-business-process- flow?context=/dynamics365/context/sales-context#edit-a-business-process-flow

QUESTION 61
DRAG DROP
You manage Dynamics 365 Customer Service. You have a routing rule set named CustomerResolution that assigns general inquiry cases to a queue named GeneralInquiry.
You need to assign technical support cases to a queue named TechSupport.
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:



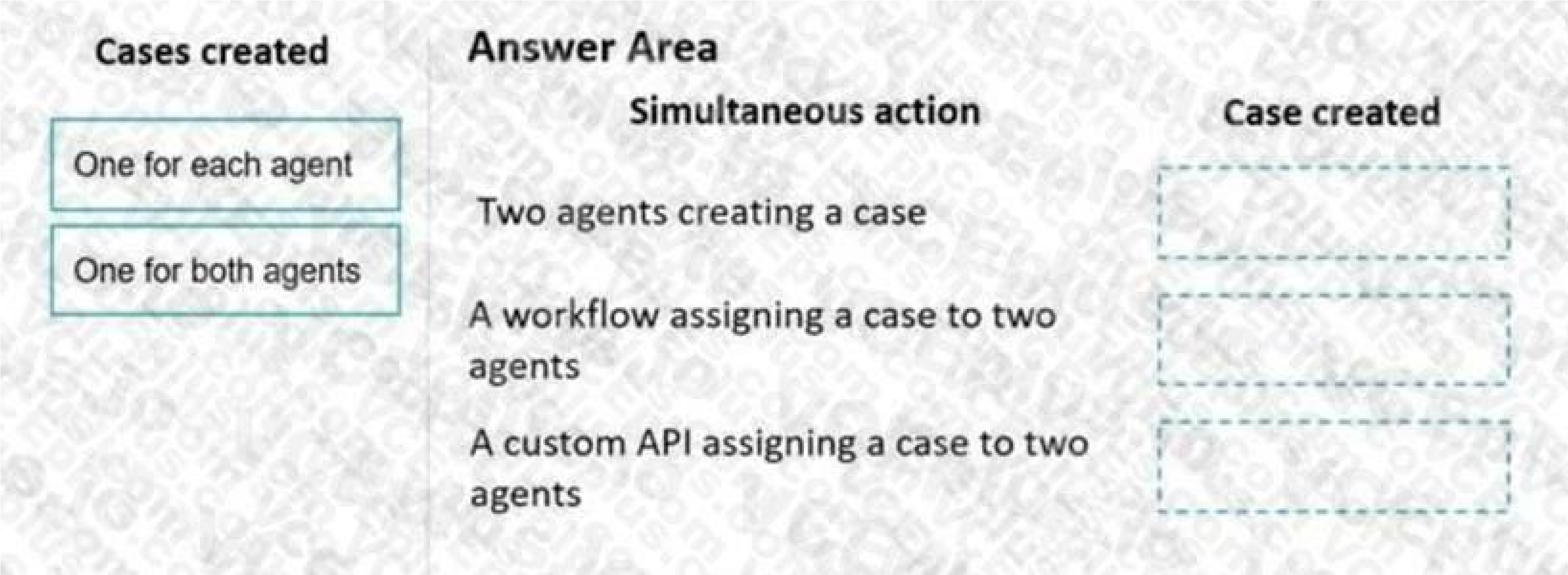
Correct Answer:



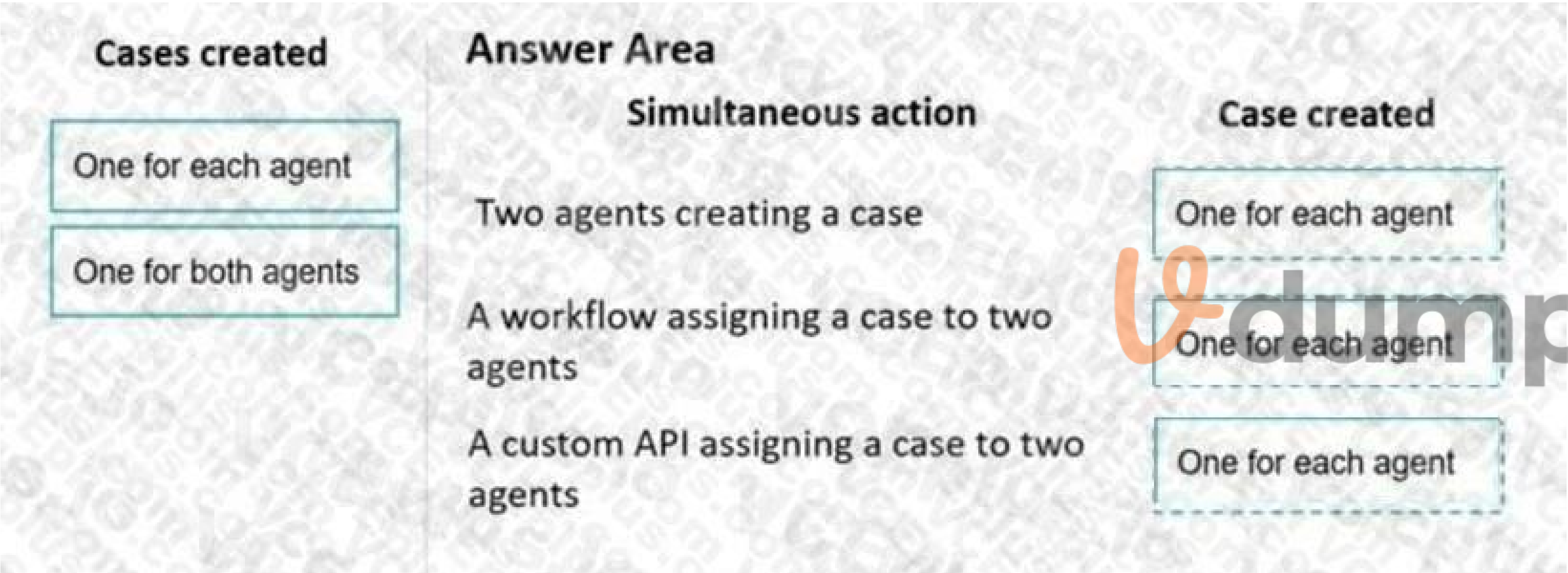
Section:
Explanation:
https://docs.microsoft.com/en-us/dynamics365/customer-service/create-rules-automatically-route-cases

QUESTION 62
DRAG DROP
A service manager discovers a high number of cases in the agent queues. Cases are created manually but can be reassigned using a workflow or custom API.
The manager needs to know whether cases are getting duplicated because of simultaneous case creation or simultaneous case assignment.
You need to identify the number of cases that are created in each scenario.
How many cases are created? To answer, drag the appropriate cases created options to the correct simultaneous actions.
Each cases created option 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:



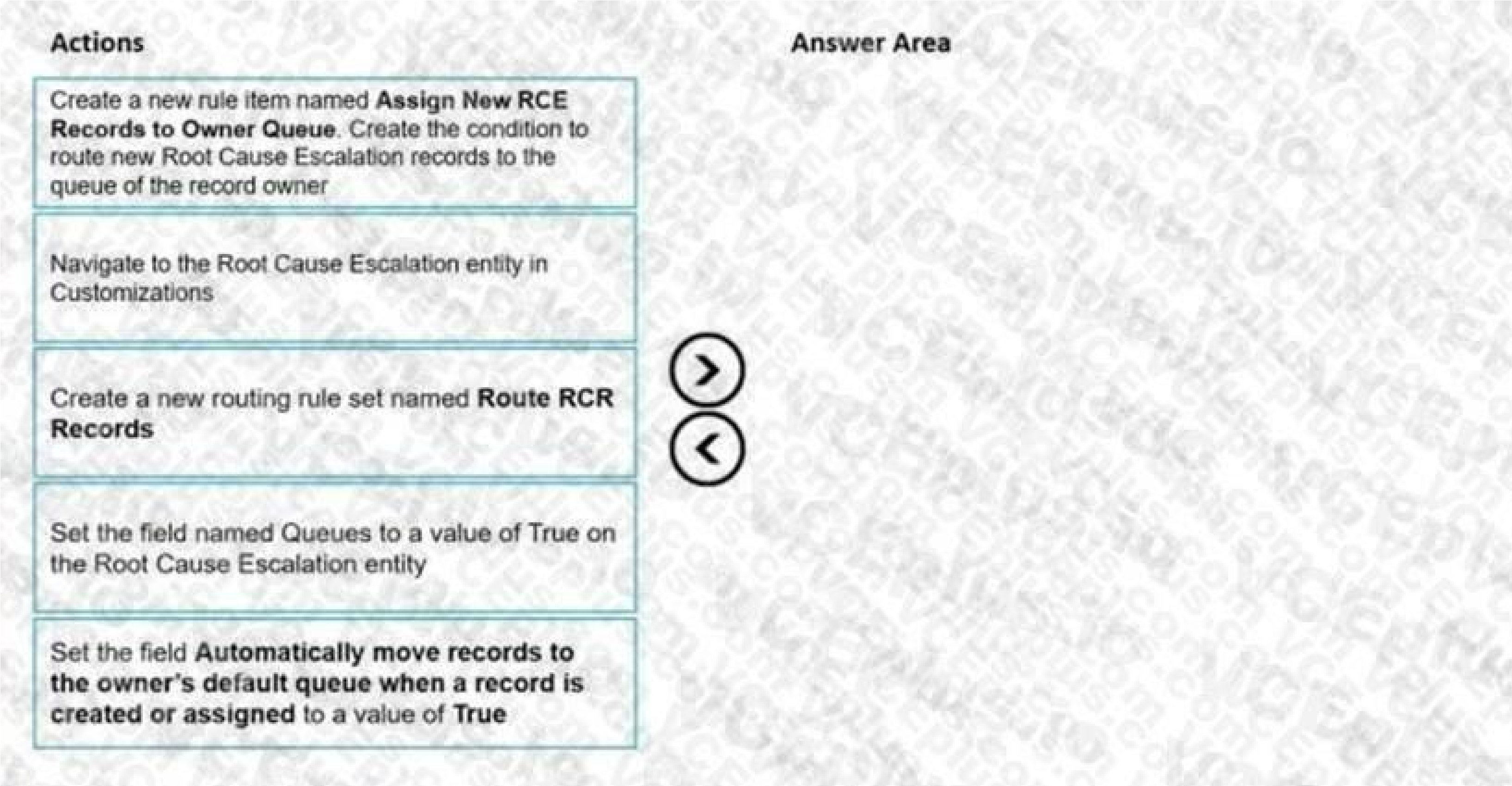
Correct Answer:



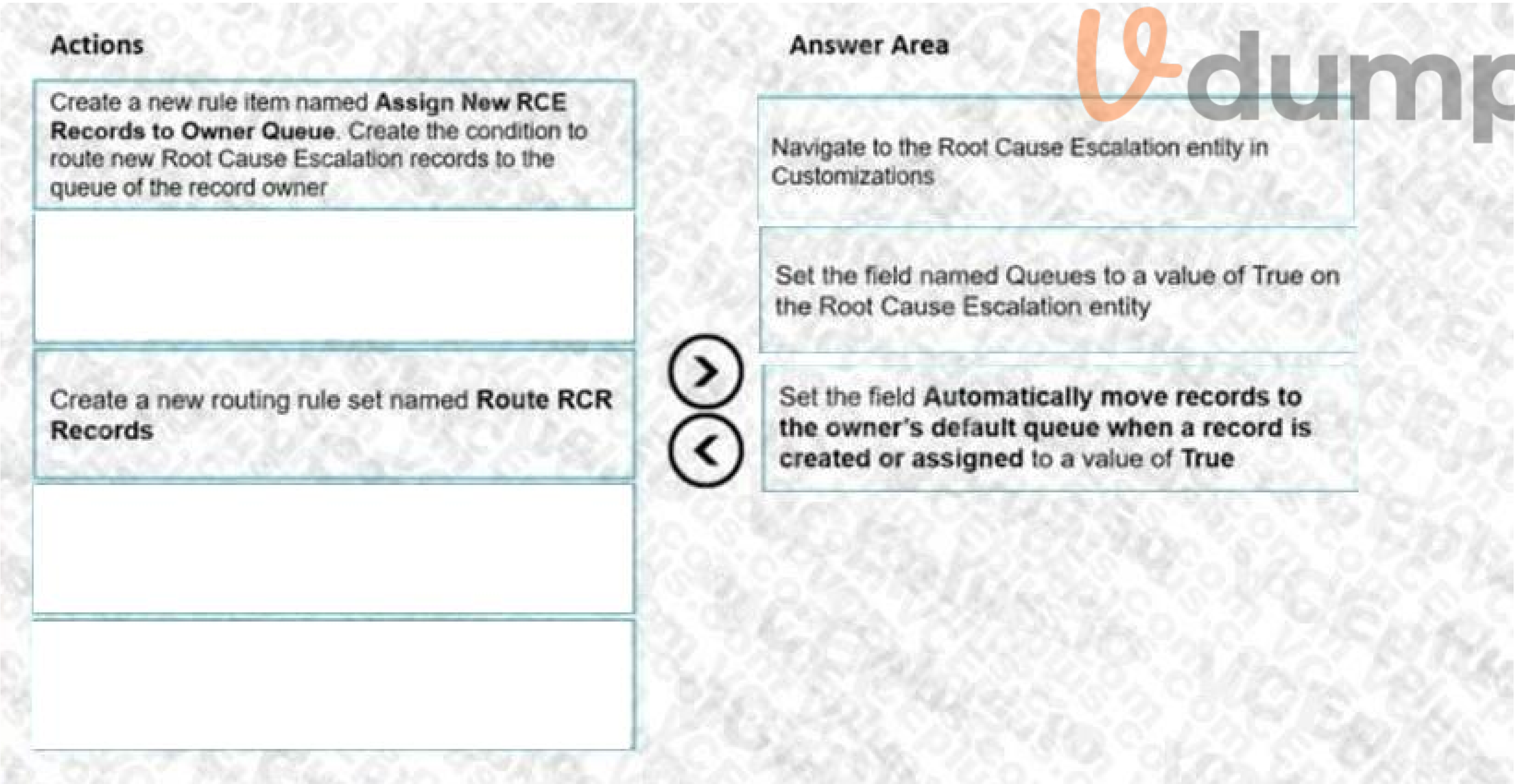
Section:
Explanation:
https://docs.microsoft.com/en-us/dynamics365/customer-service/set-up-queues-manage-activities-cases

QUESTION 63
DRAG DROP
You are a Dynamics 365 Customer Service administrator.
You create a new entity named Root Cause Escalation. Queues must be used for new Root Cause Escalation records. The records must be automatically assigned to the record owner's default queue when a record is created.
You need to implement the proper functionality to meet the requirements.
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/enable-entities-for-queues

QUESTION 64

DRAG DROP

A GOV company implements Dynamics 365 Customer Service.

You are setting up scheduling to dispatch repair technicians. You encounter the following issues:

You are unable to create a new organizational unit.

Repair technicians are accidentally scheduled to work on days when company is on holiday.

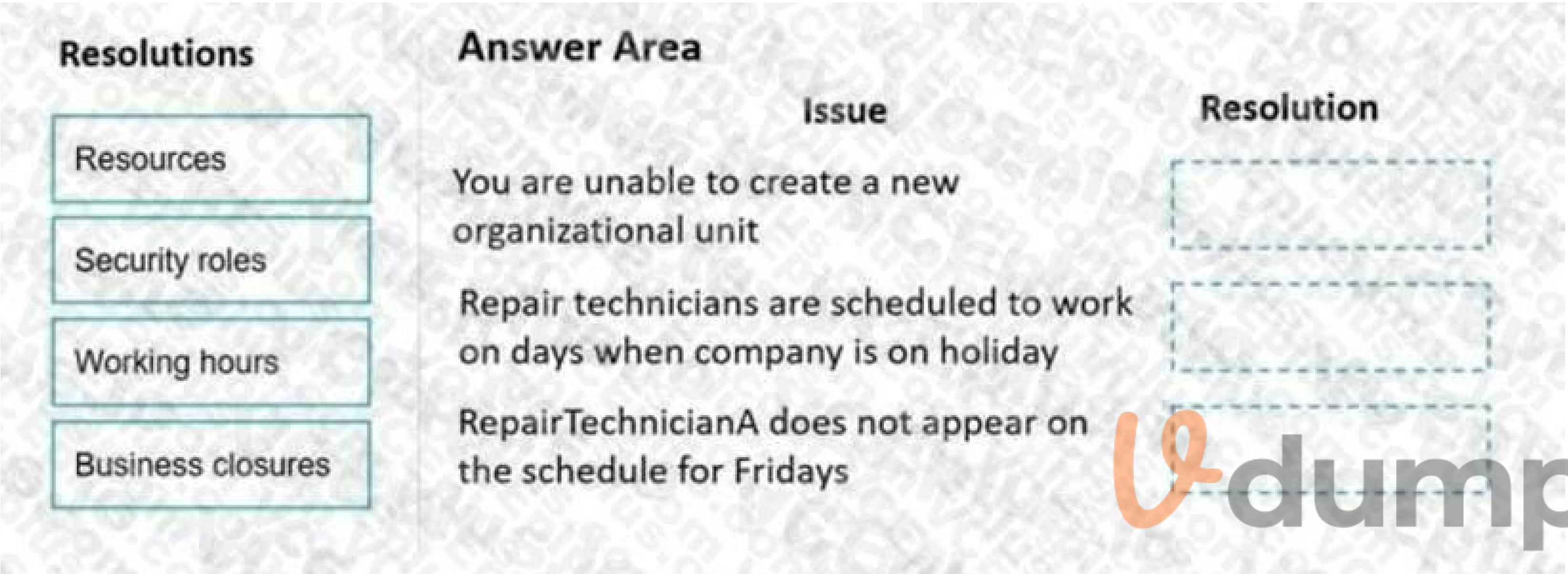
RepairTechnicianA does not appear on the schedule for Fridays for any issue.

You need to resolve the issues.

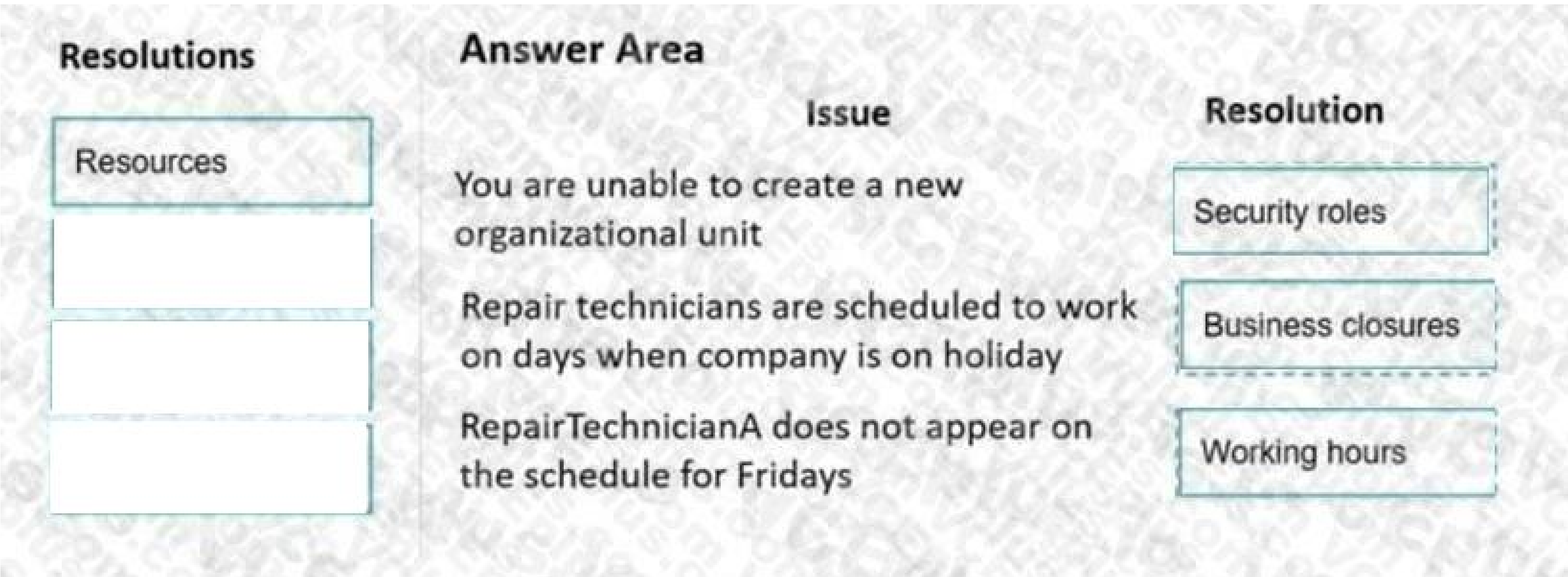
What should you modify to correct the issues? To answer, drag the appropriate resolutions to the correct issues. Each source may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

Select and Place:



Correct Answer:



Section:

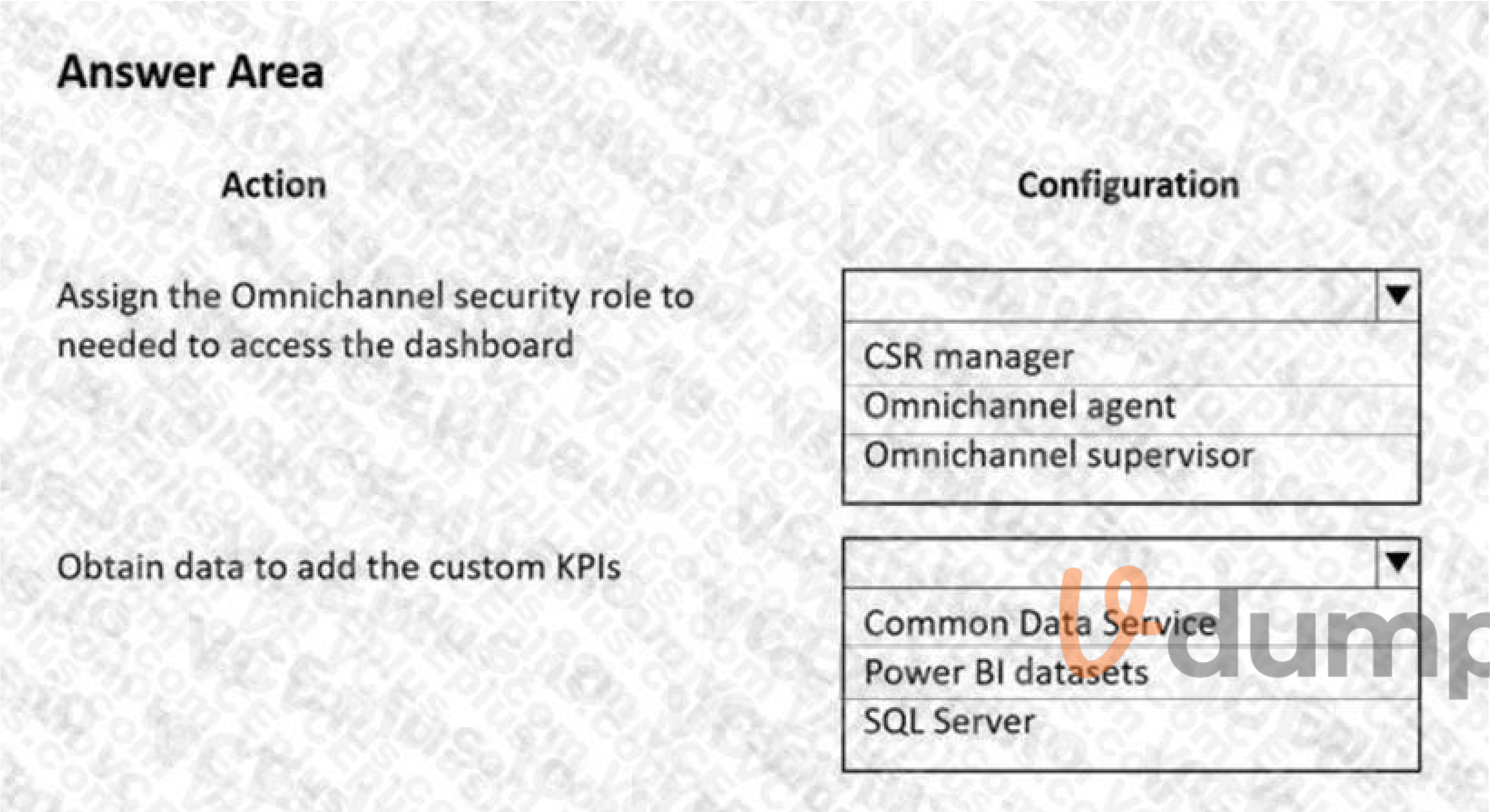
Explanation:

QUESTION 65

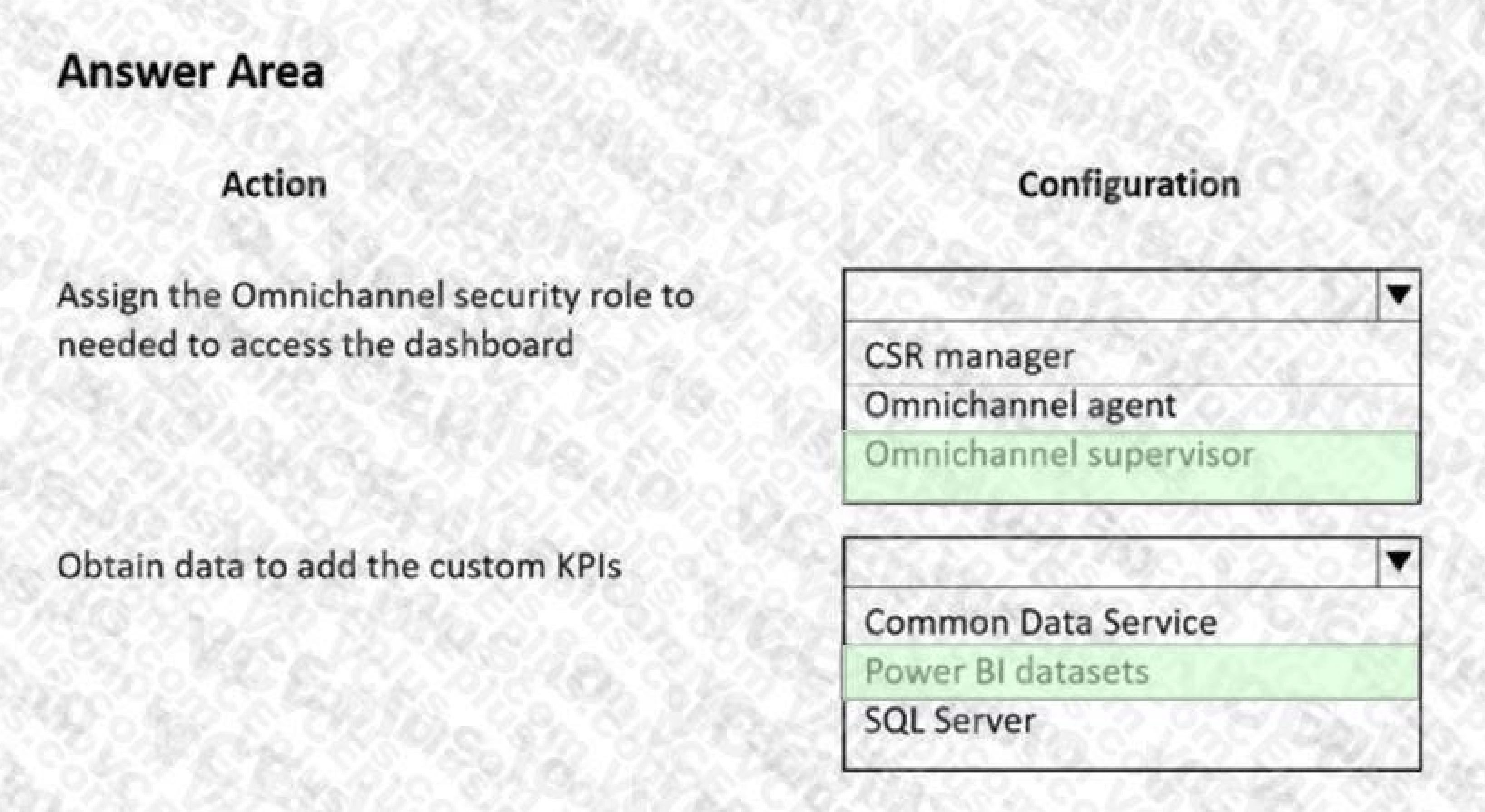
HOTSPOT

You are implementing Omnichannel for Customer Service for a call center.
The call center manager needs to be able to track agents' performance.
You need to configure the intraday insights dashboard to meet the requirement.
Which configurations 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:



Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-service/configure-intraday-dashboard-supervisor

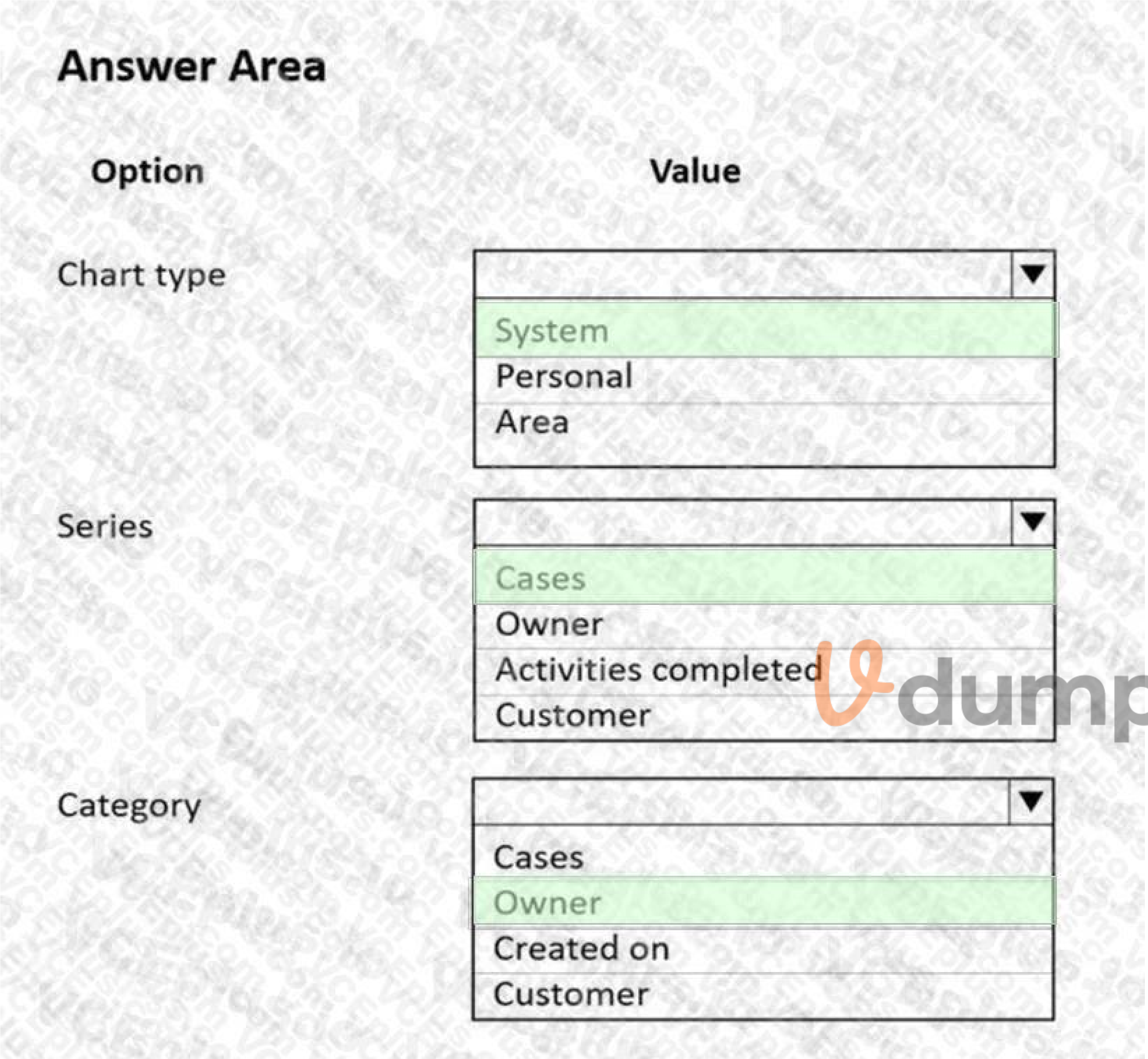
QUESTION 66
HOTSPOT
You are creating a bar chart that displays the 10 help desk representatives who are resolving the most cases.
You need to ensure that all team members can view the chart. You do not have share privileges.
How should you configure the chart? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Hot Area:

Answer Area

Option	Value
Chart type	System Personal Area
Series	Cases Owner Activities completed Customer
Category	Cases Owner Created on Customer

Answer Area:

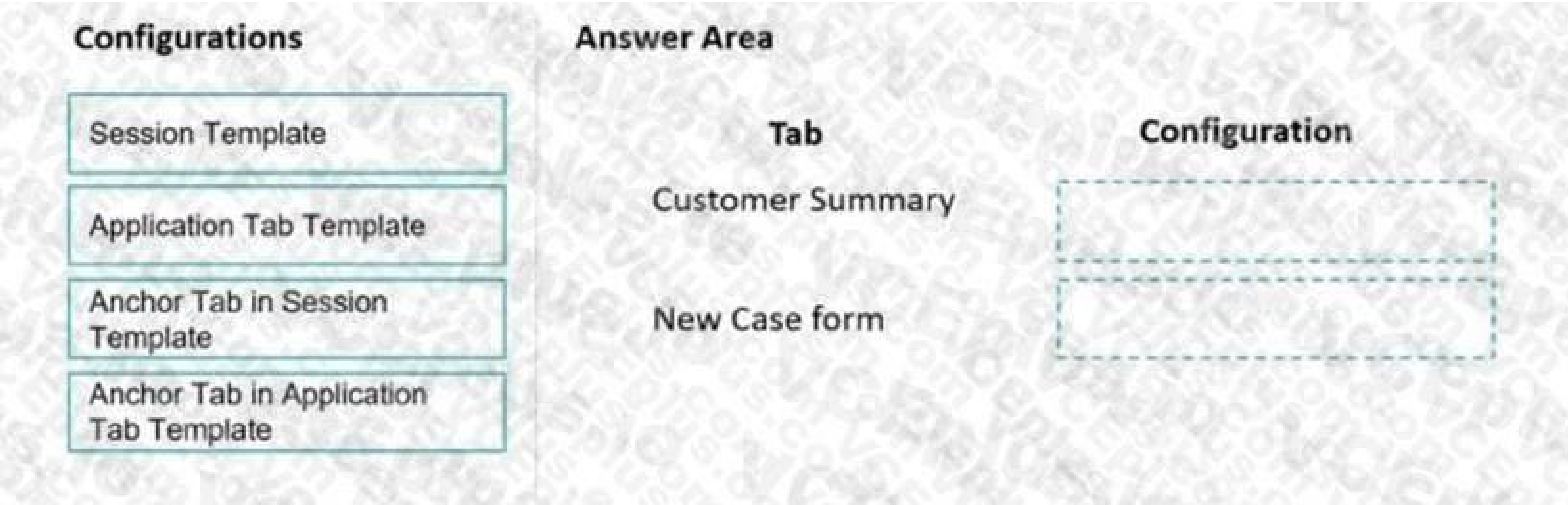


Section:
Explanation:
Reference: https://docs.microsoft.com/en-us/dynamics365/customerengagement/on-premises/developer/customize- dev/understand-charts-underlying-data-chart-representation?view=op-9-1

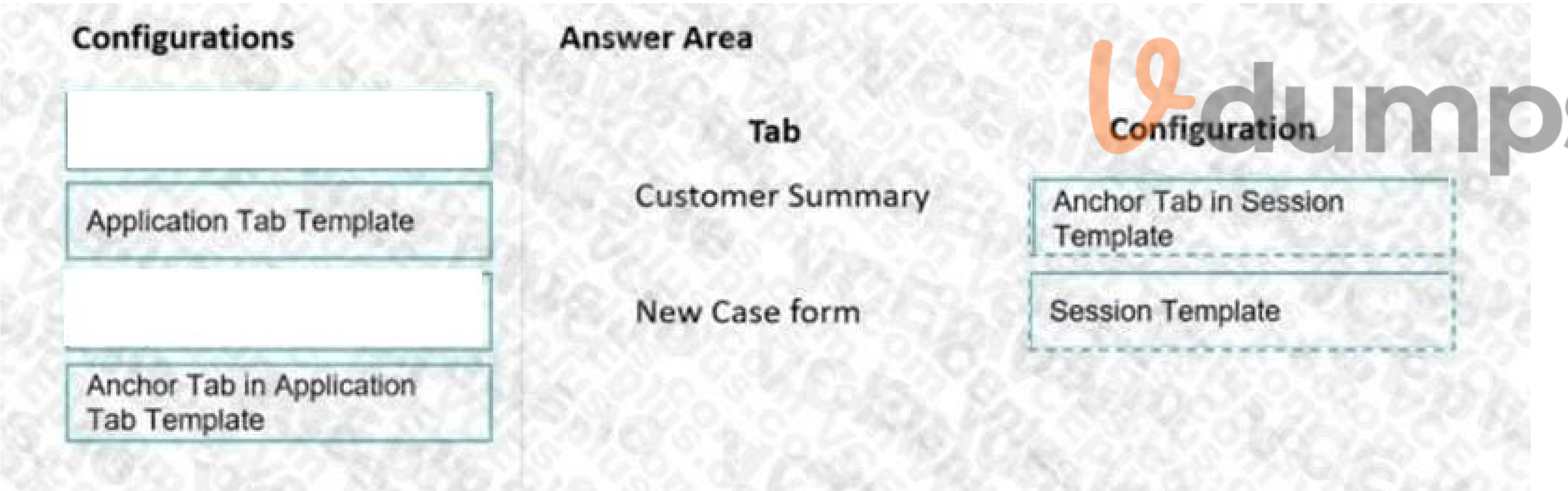
QUESTION 67
DRAG DROP
You are implementing Omnichannel for Customer Service for a call center.
The call center's requirements for the implementation are as follows:
When a new chat conversation is started, the Customer Summary and New Case form tabs must be open.
The Customer Summary tab must be the primary tab during the conversation.
Agents must be able to close the New Case form tab.

Agents must not be able to close the Customer Summary tab.
You need to configure the tabs.
Which configuration should you use for each tab? 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:



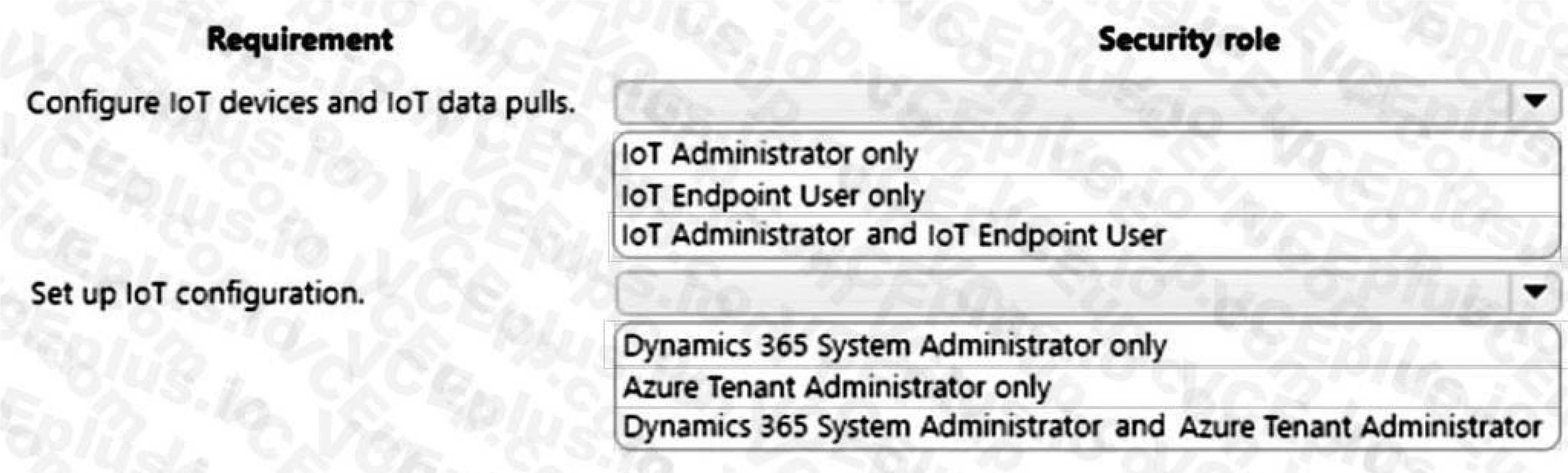
Correct Answer:



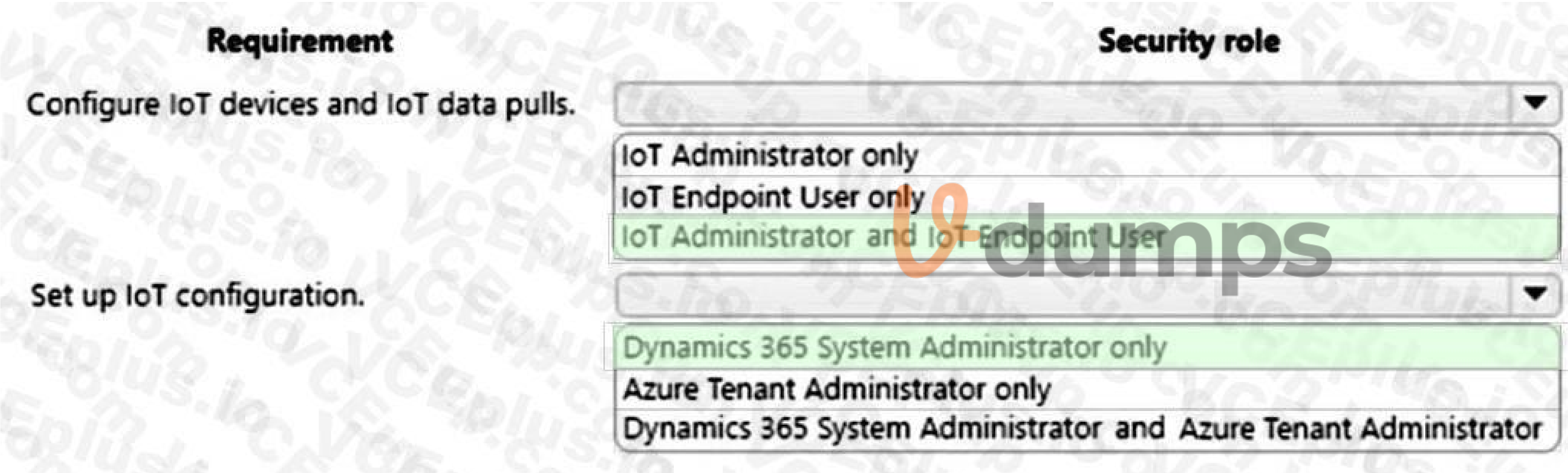
Section:
Explanation:
Reference: https://docs.microsoft.com/en-us/dynamics365/app-profile-manager/session-templates

QUESTION 68
HOTSPOT
You need to configure security roles for Dynamics 365 Connected Customer Service by using the principle of least privilege.
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:

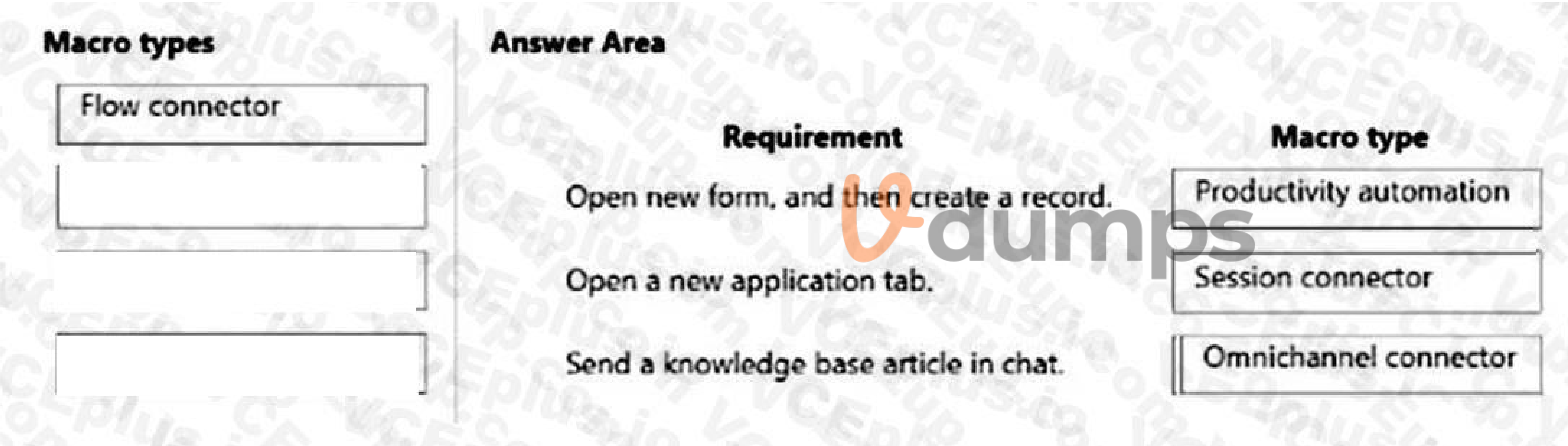


Section:
Explanation:

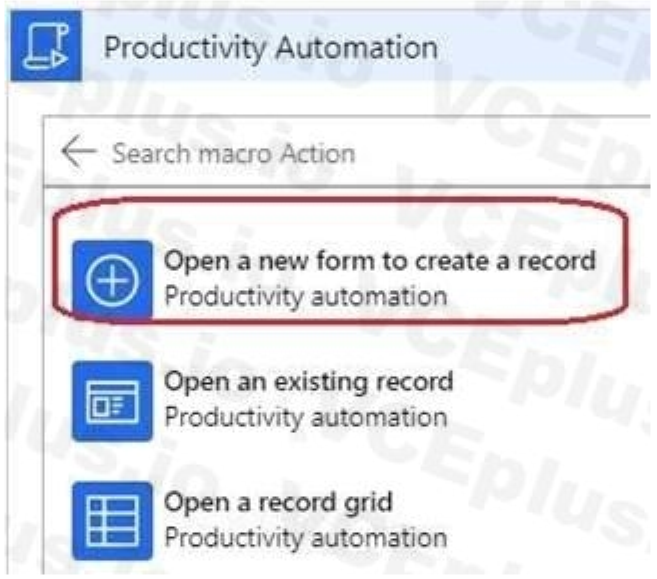
QUESTION 69
DRAG DROP
A GOV company is implementing Omnichannel for Customer Service.
You must set up the system to minimize human error and automate actions. The requirements to set up the system are as follows:
• Representatives must create a new support record when a customer contacts them through chat.
• Knowledge base articles must open in a separate tab when representatives research answers.
• When a knowledge base article resolves a customer issue, representatives must send the article to the customer via chat.
You need to set up the macros.
Which macro type should you use? To answer, drag the appropriate macro types to the correct requirements. Each macro 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:

Correct Answer:

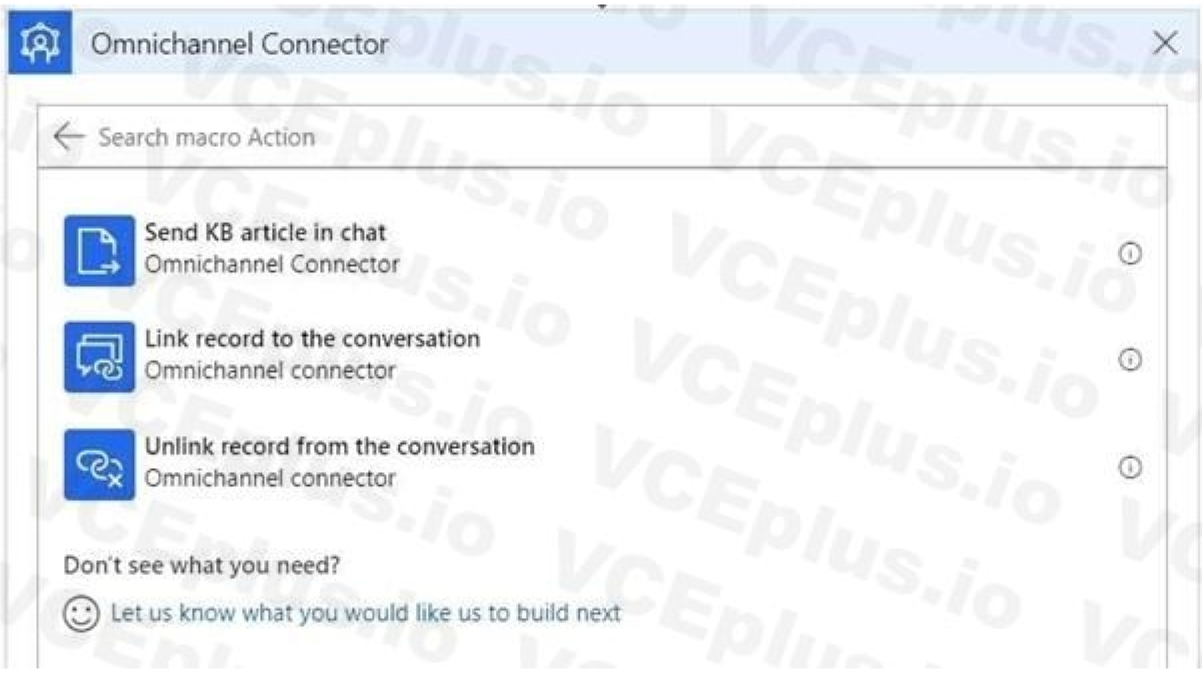


Section:
Explanation:
Box 1: Productivity automation
Productivity automation
As an administrator, you can use the actions any number of times across different macros to automate and perform model-driven app operations.



The following screenshot shows the actions that are explained in the subsequent sections.
Box 2: Session connector
Session connector
As an administrator, you can use the actions any number of times across different macros to automate and perform operations related to a session in Customer Service workspace.

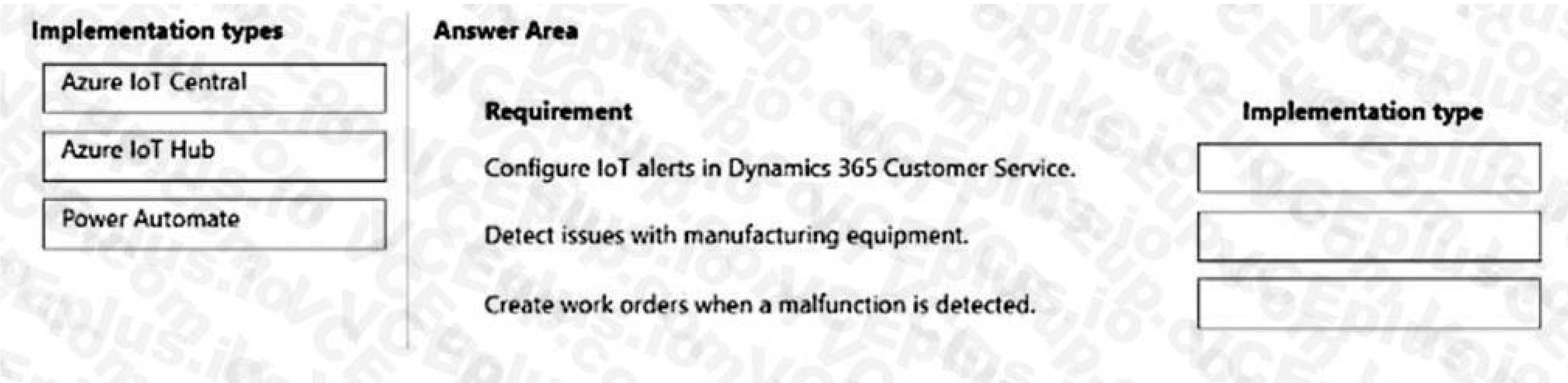

Box 3: Omnichannel connector
Omnichannel connector
As an administrator, you can use the actions any number of times across different macros to automate and perform operations related to Omnichannel for Customer Service.



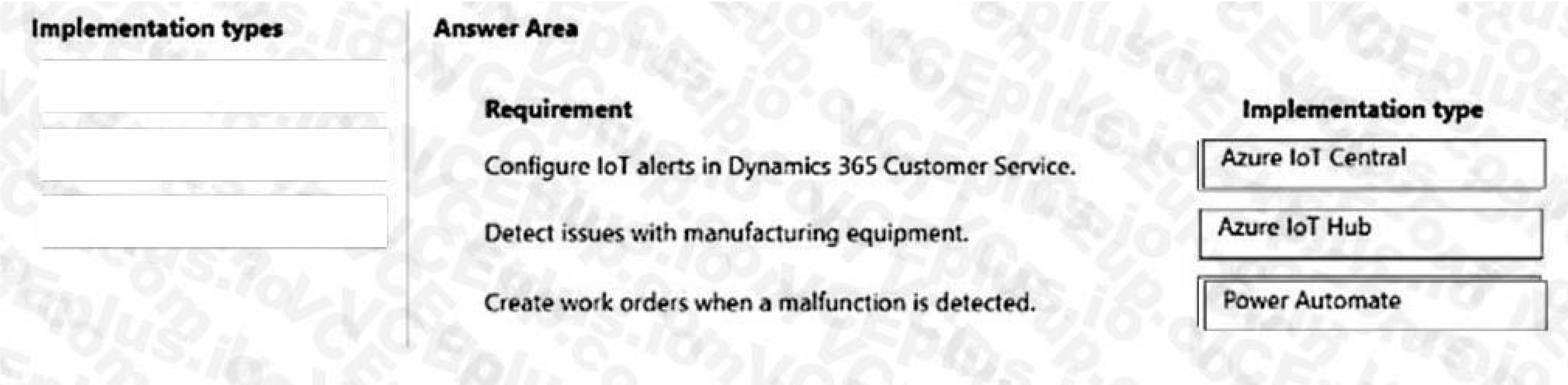
Reference:
https://docs.microsoft.com/en-us/dynamics365/app-profile-manager/macros

QUESTION 70
DRAG DROP
A GOV company deploys Dynamics 365 Customer Service. The company plans to use IoT to collect information about manufacturing equipment.
Work orders must be automatically generated when malfunctions are detected to ensure that malfunctions are corrected quickly.
You need to design a Connected Customer Service solution.
What should you use? To answer, drag the appropriate implementation types to the correct requirements. Each implementation 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:



Correct Answer:



Section:
Explanation:
Box 1: Azure IoT Central
Answer:
Microsoft Azure IoT Central enables builders to configure rules and actions. Based on those actions,
IoT alerts will be created in Connected Customer Service. Also, based on service activities in
Connected Customer Service, information can be sent back to IoT Central. This is accomplished by using Power Automate, a SaaS offering for automating workflows across applications and services.
Box 2: Azure IoT Hub
Connected Customer Services uses the IoT Hub to manage the state of registered devices. In addition, the IoT Hub sends commands and notifications to connected devices—and tracks message delivery with acknowledgment receipts. Device messages are sent in a durable way to accommodate intermittently connected devices.
Box 3: Power Automate
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-service/cs-iot-overview

QUESTION 71
DRAG DROP
You must create a custom web portal to support customer service processes. The portal must allow customers to chat with customer service if the customer initiates a chat conversation.
You need to embed the chat widget into the web portal.
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

- In Content Snippet > Chat widget code in the web portal, paste the widget snippet code.
- Open Omnichannel Administration.
- In Channels > Chat, find the Chat Widget.
- On the Basic details tab, set Enable Proactive Chat to **Yes**.
- Open the Portal Management app.
- On the Basic details tab, copy the widget snippet code.

Answer area

Correct Answer:

Actions

- In Channels > Chat, find the Chat Widget.
- On the Basic details tab, set Enable Proactive Chat to **Yes**.

Answer area

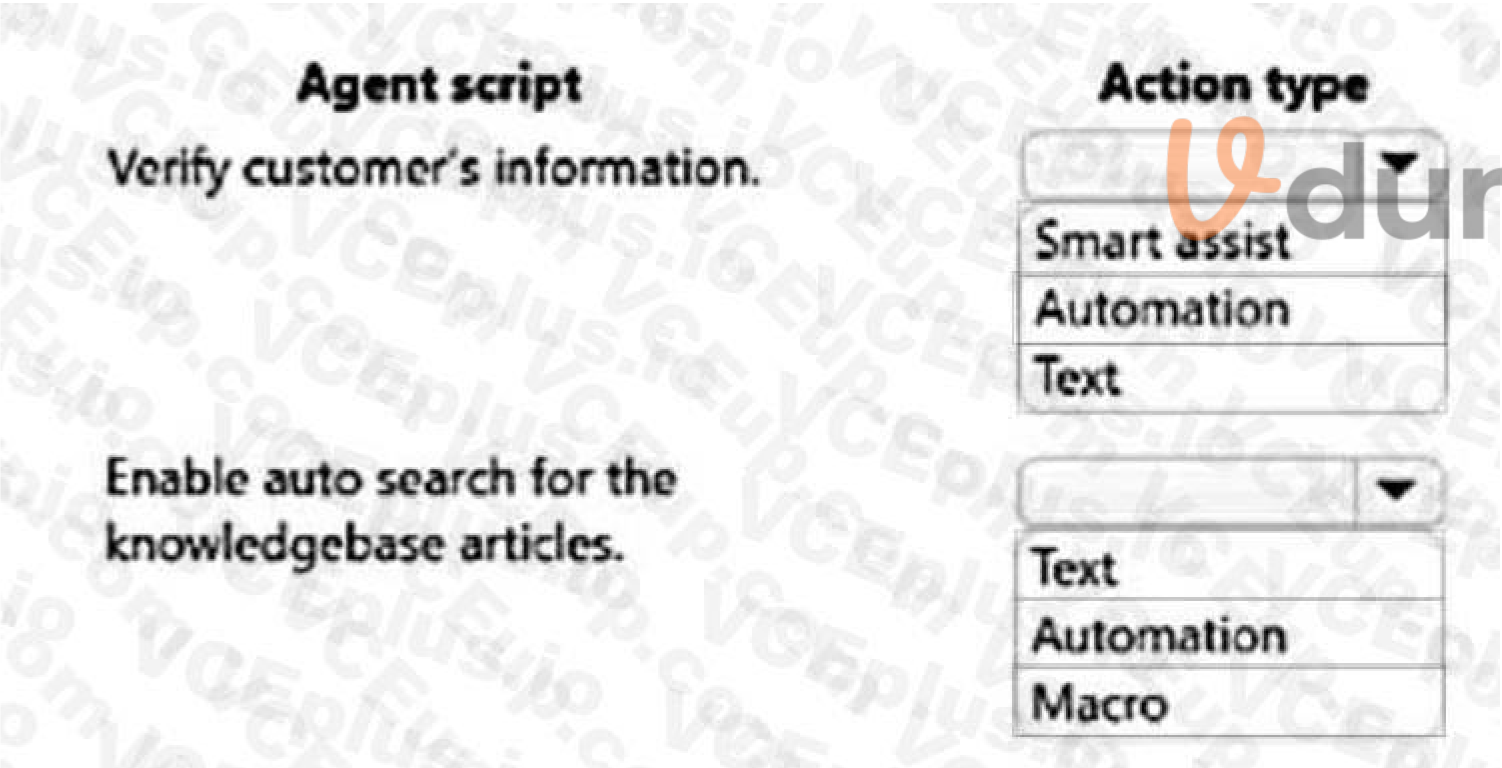
- Open Omnichannel Administration.
- On the Basic details tab, copy the widget snippet code.
- Open the Portal Management app.
- In Content Snippet > Chat widget code in the web portal, paste the widget snippet code.

Section:
Explanation:
Step 1: Open Omnichannel Administration.
Embed chat widget in your Power Apps portal
To embed a chat widget in Power Apps portals:
1. In one of the administrator apps, open the chat widget you want to embed in Power Apps portals.
Step 2: One the Basic details tab, copy the widget snippet code.
2. On the Basic details tab, copy the widget snippet code from the Code snippet section.
Step 3: Open the Portal Management app.
3. Open the Portal Management app.

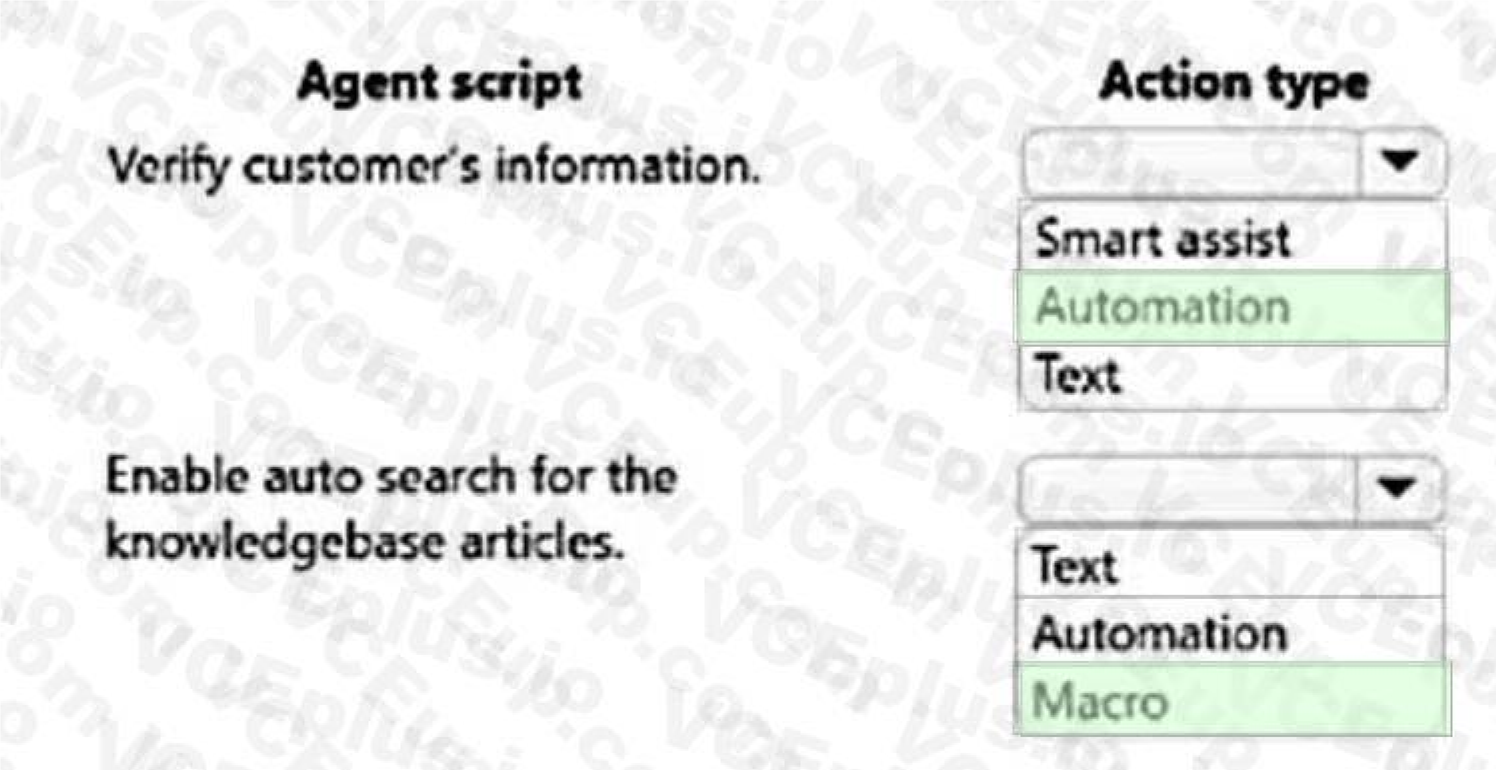
Step 4: In Content Snippet > Chat widge code in the web portal, paste the widget snippet code.
4. Go to Portal > Content Snippets.
5. Find the Chat Widget Code content snippet and open it.
6. On the General tab, scroll down to the Value (HTML) section.
7. Paste the chat widget snippet code in the HTML tab.
8. Save the changes. The chat widget is now embedded into the portal.
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-service/embed-chat-widget-portal

QUESTION 72
HOTSPOT
A GOV company uses Omnichannel for Customer Service.
The company has the following requirements for their agents' conversations with customers:
Agents must verify a customer's information when a chat starts.
Auto search must be enabled for knowledgebase articles based on case title.
You need to enable agent scripts.
Which action types 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:



Section:
Explanation:
Box 1: Automation
The automation dictionary maintains the contextual data for sessions. You can use the keys from the automation dictionary to pass the parameter in an action.
While creating templates and macros in the admin app, you can pass parameter keys such as title of a session, title of notification, title of an application tab template, and custom parameter values for application tab types.
These keys are replaced based on the contextual information available at the time of execution.
Box 2: Macro
Automate tasks with macros
Overview of macros
In the customer service industry, agents have to click often to perform simple tasks, such as open a form, fill, and save it, and many repetitive and monotonous actions, such as greeting and verifying a customer, sending acknowledgment mail, and taking notes. These clicks and repetitive tasks can lead to human errors when agents copy and paste the data across different operations.
Macros are a set of sequential actions that are performed by a user. They enable users to perform daily operations efficiently in a fast and process-compliant manner. You can reuse macros with different sessions based on the context parameters that are specific to the session.
The value propositions of the macros are as follows:
Automate repetitive and monotonous tasks with a single click.
Minimize human errors.
Adhere to business processes.
Lower average handling time.
Improve customer satisfaction.
Create contextual and reusable macros.
Reference:
https://docs.microsoft.com/en-us/dynamics365/app-profile-manager/automation-dictionary-keys
https://docs.microsoft.com/en-us/dynamics365/app-profile-manager/macros
https://docs.microsoft.com/en-us/dynamics365/app-profile-manager/smart-assist

QUESTION 73
DRAG DROP
A GOV company wants to use Power Virtual Agents chatbots to enable customers to solve their own issues whenever possible. You create knowledge base articles.
You must ensure that the new articles are available through the chatbot.
You need to define the steps to integrate knowledge management with the chatbot.

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

- Create a topic for the chatbot and add an action
- Test the Power Automate cloud flow
- Enable file attachments
- Publish knowledge base articles to a portal created in Power Apps
- Set up a routing for users to get the correct queue
- Use a Power Automate template to add a solution to the chatbot

Answer Area

Correct Answer:

Actions

- Enable file attachments
- Set up a routing for users to get the correct queue

Answer Area

- Publish knowledge base articles to a portal created in Power Apps
- Create a topic for the chatbot and add an action
- Use a Power Automate template to add a solution to the chatbot
- Test the Power Automate cloud flow

Section:
Explanation:
Step 1: Publish knowledge articles to a portal created in Power Apps
Step 2: Create a topic for the Power Virtual Agents bot, and add an action
Step 3: Use a Power Automate template to add the solution to the chatbot
Step 4: Test the Power Automate cloud flow

Test the flow to publish and share the bot.
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-service/integrate-km-with-pva

QUESTION 74
HOTSPOT
A GOV company uses Dynamics 365 Customer Service to provide product support to customers. Only employees are included in the company's Azure Active Directory.
You need to configure the system to meet the following requirements. You must minimize the effort required to complete any required configuration tasks.
Create a website for external customers to open support tickets and see the status of open issues.
Ensure that customers are set up to use this website.
What should you configure? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Hot Area:

Requirement	Configuration
Portal creation	Create a portal by using the Customer self-service template Create a portal by using the Community portal template Create and share a model-driven app with your customers Create and share a canvas app with your customers
Customer setup	Ensure that all customers have a contact record Ensure that all customers have an account record Ensure that the appropriate model-driven app is shared with each customer Ensure that the appropriate canvas app is shared with each customer

Answer Area:

Requirement | **Configuration**

Portal creation

- Create a portal by using the Customer self-service template
- Create a portal by using the Community portal template
- Create and share a model-driven app with your customers
- Create and share a canvas app with your customers

Customer setup

- Ensure that all customers have a contact record
- Ensure that all customers have an account record
- Ensure that the appropriate model-driven app is shared with each customer
- Ensure that the appropriate canvas app is shared with each customer

Section:
Explanation:
Box 1: Create a portal by using the Customer self-service template
Create a website for external customers to open support tickets and see the status of open issues.
The Customer portal is a Power Apps portals template that lets companies create an externally facing business-to-business (B2B) website for scenarios that are related to sales order processing.
Customer self-service portal: A customer self-service portal enables customers to access self-service knowledge, support resources, view the progress of their cases, and provide feedback.
Its powerful self-service functionality guides customers to the answers they seek without human intervention or by connecting them to your most qualified agent for the task if the issue can't be resolved client-side autonomously.
Box 2: Ensure that all customers have an account record.
Ensure that customers are set up to use this website.
Note: Using the standard functionality, if I login to the Customer Service Portal I can create a new case linked either to myself as a Contact or to my related company as an Account (assuming that the Account is specificed on my contact record in Dynamics 365 CE).
Reference:
https://docs.microsoft.com/en-us/power-apps/maker/portals/portal-templates
https://docs.microsoft.com/en-us/dynamics365/supply-chain/sales-marketing/customer-portaloverview
https://readyxrm.blog/2019/07/04/dynamics-365-customer-self-service-powerapps-portalscreating-a-case-on-behalf-of-another-account/

QUESTION 75
HOTSPOT
You are creating a virtual agent to handle common customer inquiries.
The virtual agent must provide the ability to route customers to live agents for escalation.
You need to recommend a solution.
Which components 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	Component
View customer conversations in real time to determine routing effectiveness.	Schedule board Agent dashboard Supervisor dashboard
Route conversations to the first available human agent.	Fallback topic Implicit trigger Context variable

Answer Area:

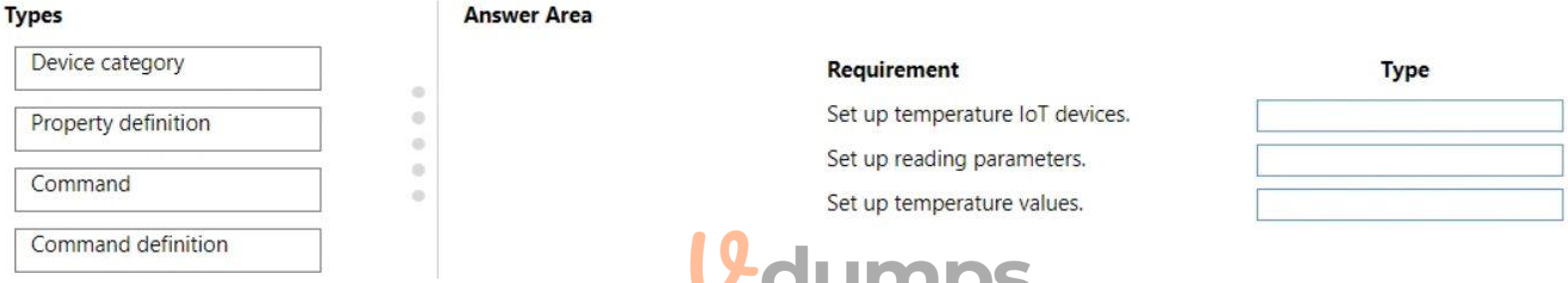
Answer Area

Requirement	Component
View customer conversations in real time to determine routing effectiveness.	Schedule board Agent dashboard Supervisor dashboard
Route conversations to the first available human agent.	Fallback topic Implicit trigger Context variable

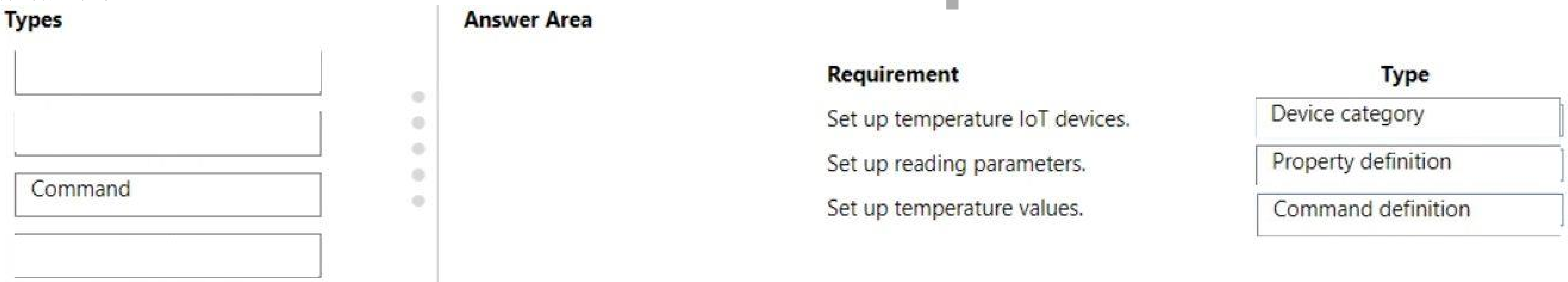
Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/power-virtual-agents/advanced-hand-off

QUESTION 76
DRAG DROP
A GOV company uses Dynamics 365 Customer Service.
A user is configuring IoT devices to record specific types of information, such as temperature, humidity, and air flow. Several types of devices require configuration for pre-set commands and ease of administration.
You need to configure the devices to generate the correct recordings.
NOTE: Each correct selection is worth one point.

Select and Place:



Correct Answer:



Section:
Explanation:

QUESTION 77
HOTSPOT
You are the Dynamics 365 administrator for a help desk. You merge CaseB into Case
A. You need to examine each case and determine what occurred.
What is the result of the merge? To answer, select the appropriate action in the dialog box in the answer area. NOTE: Each correct selection is worth one point.

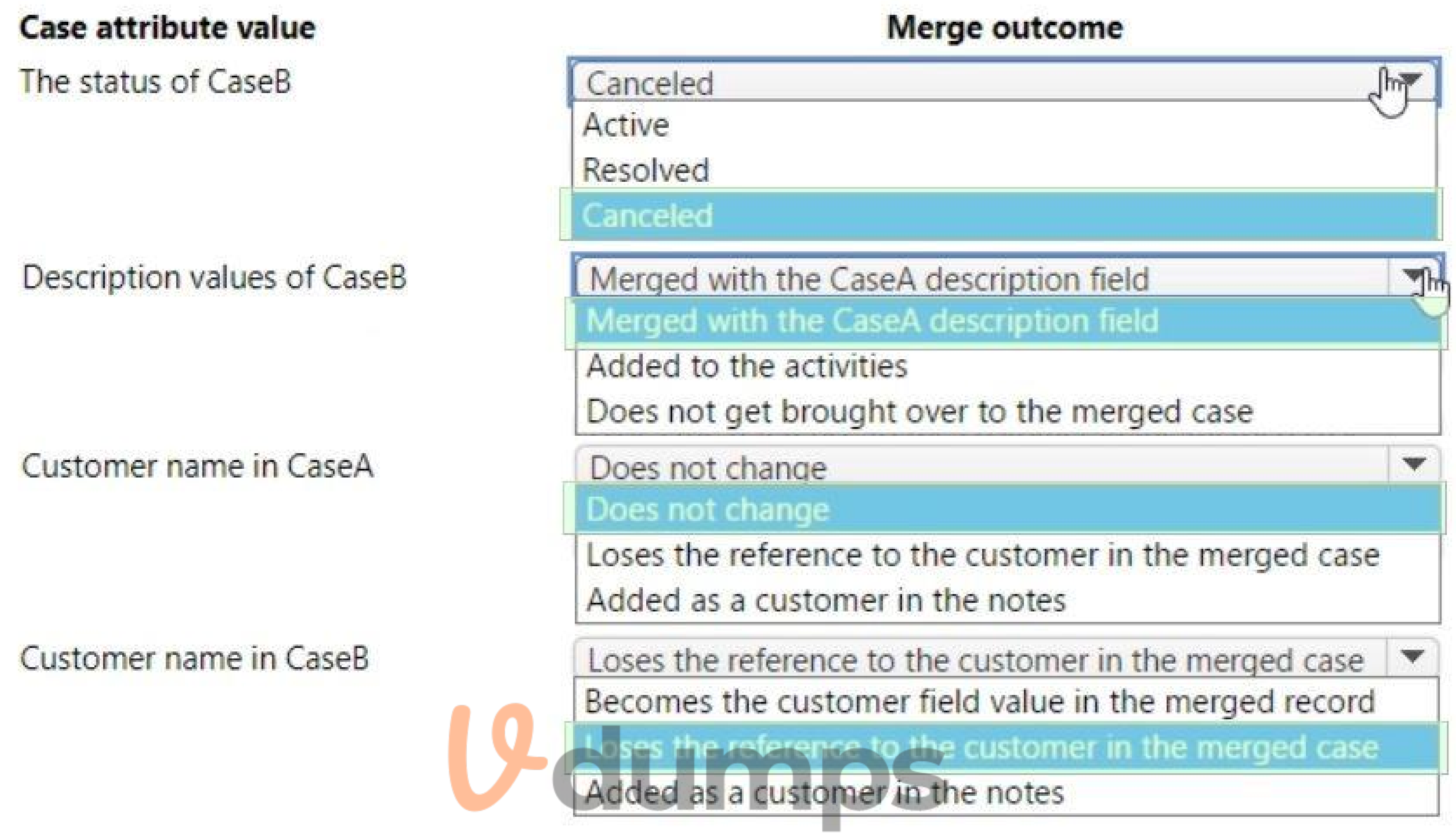
Hot Area:

Answer Area

Case attribute value	Merge outcome
The status of CaseB	Canceled Active Resolved Canceled
Description values of CaseB	Merged with the CaseA description field Merged with the CaseA description field Added to the activities Does not get brought over to the merged case
Customer name in CaseA	Does not change Does not change Loses the reference to the customer in the merged case Added as a customer in the notes
Customer name in CaseB	Loses the reference to the customer in the merged case Becomes the customer field value in the merged record Loses the reference to the customer in the merged case Added as a customer in the notes

Answer Area:

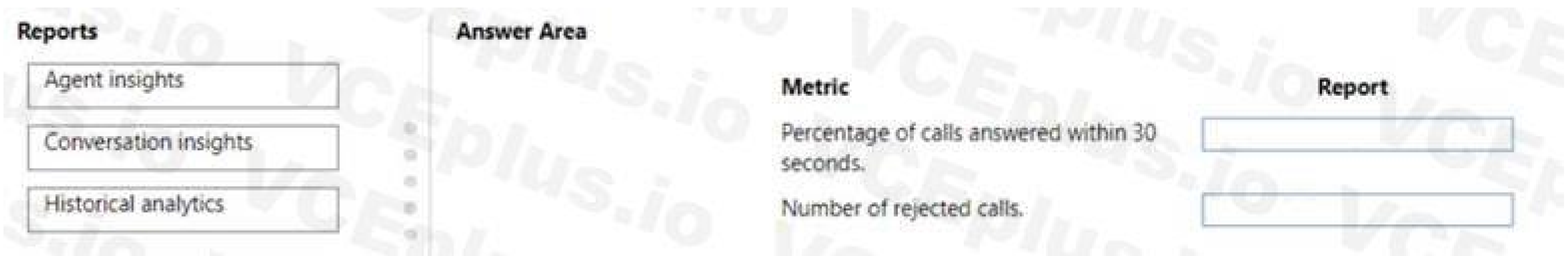
Answer Area



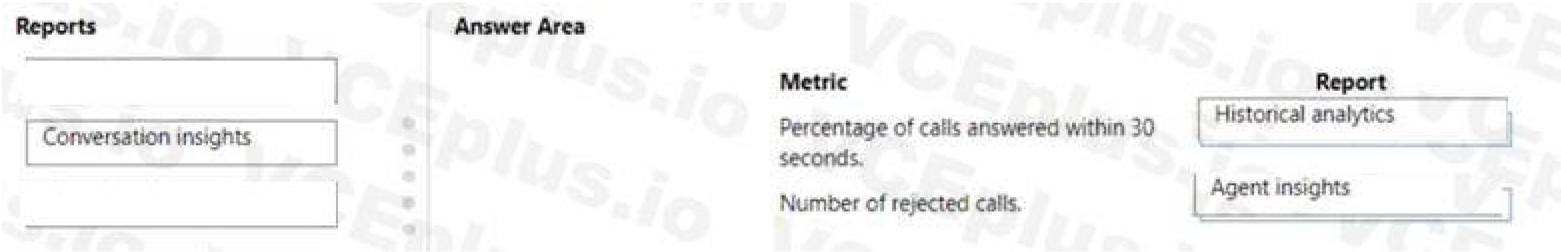
Section:
Explanation:

QUESTION 78
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 79
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 80
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:

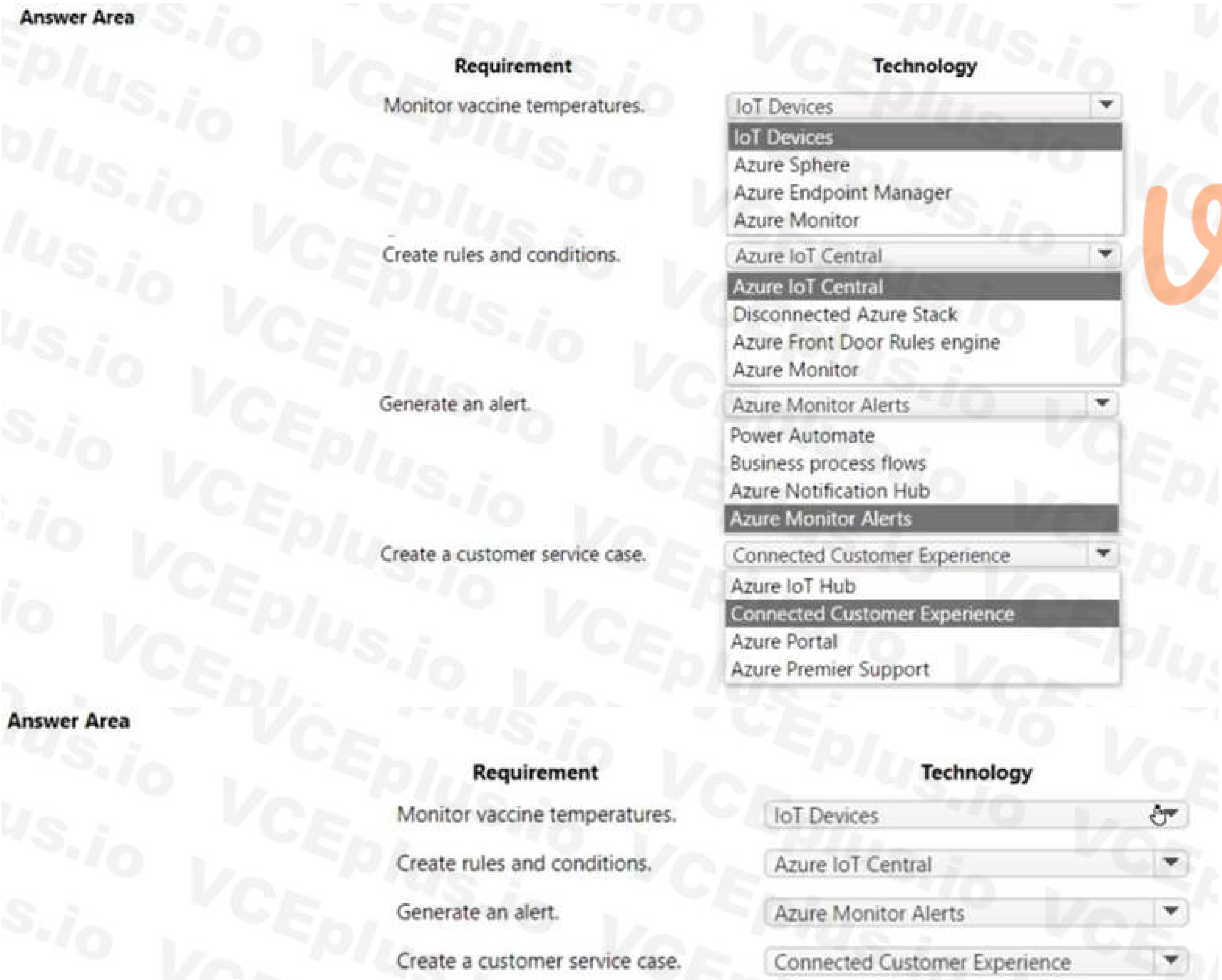
QUESTION 81
You are a Dynamics 365 Customer Service system administrator.
You are unable to add 20 hours of phone time to the Entitlement channel.
You need to determine the reason you are unable to add the hours.
What are three possible reasons? Each correct answer presents a complete solution.
NOTE: Each correct selection is worth one point.

A. The Entitlement has been canceled.

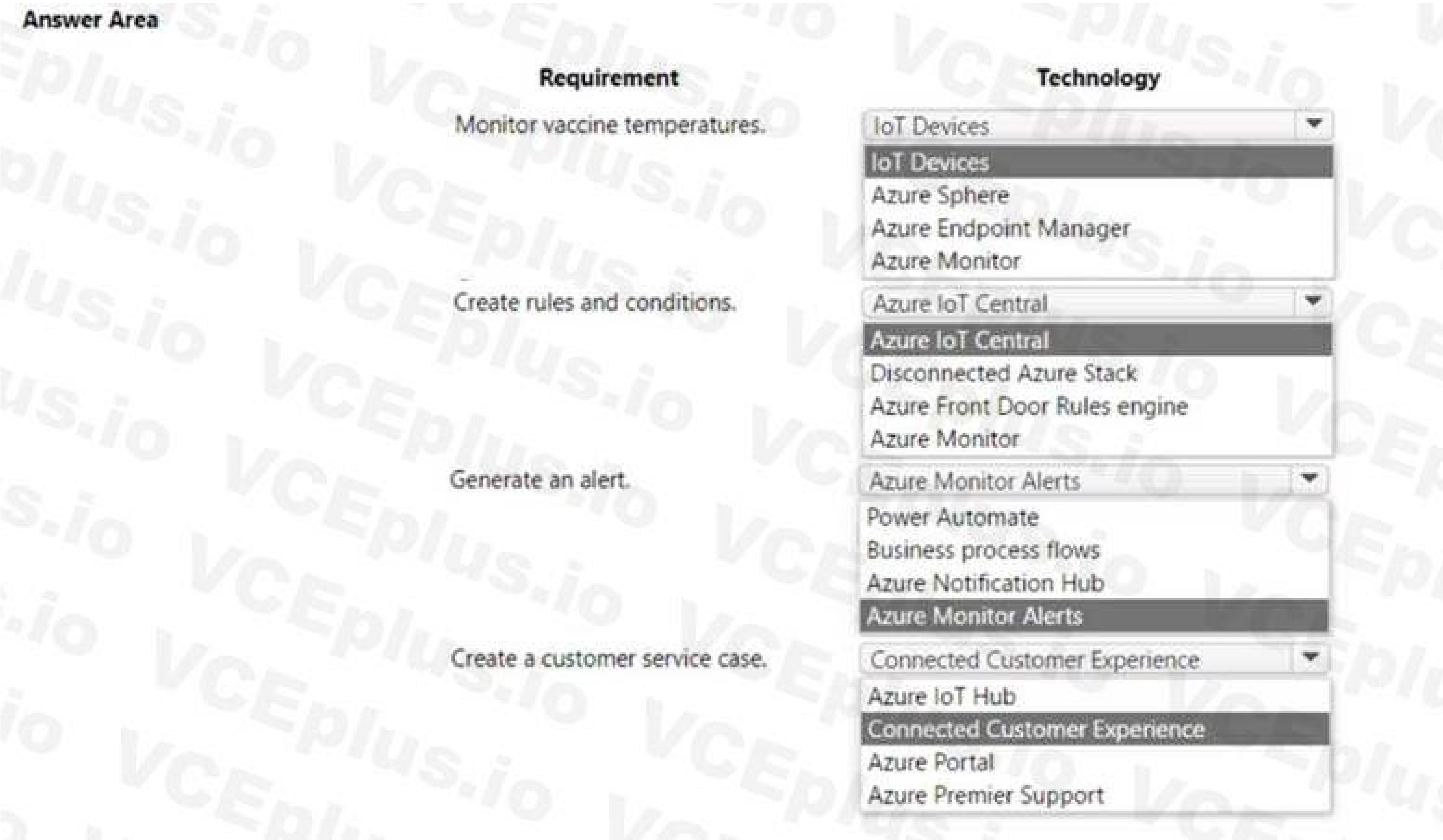
B. The Entitlement is in draft mode.
C. The Entitlement is in active mode.
D. The Entitlement start date is in the future.
E. The Entitlement expiration date has passed.

Correct Answer: A, B, D
Section:

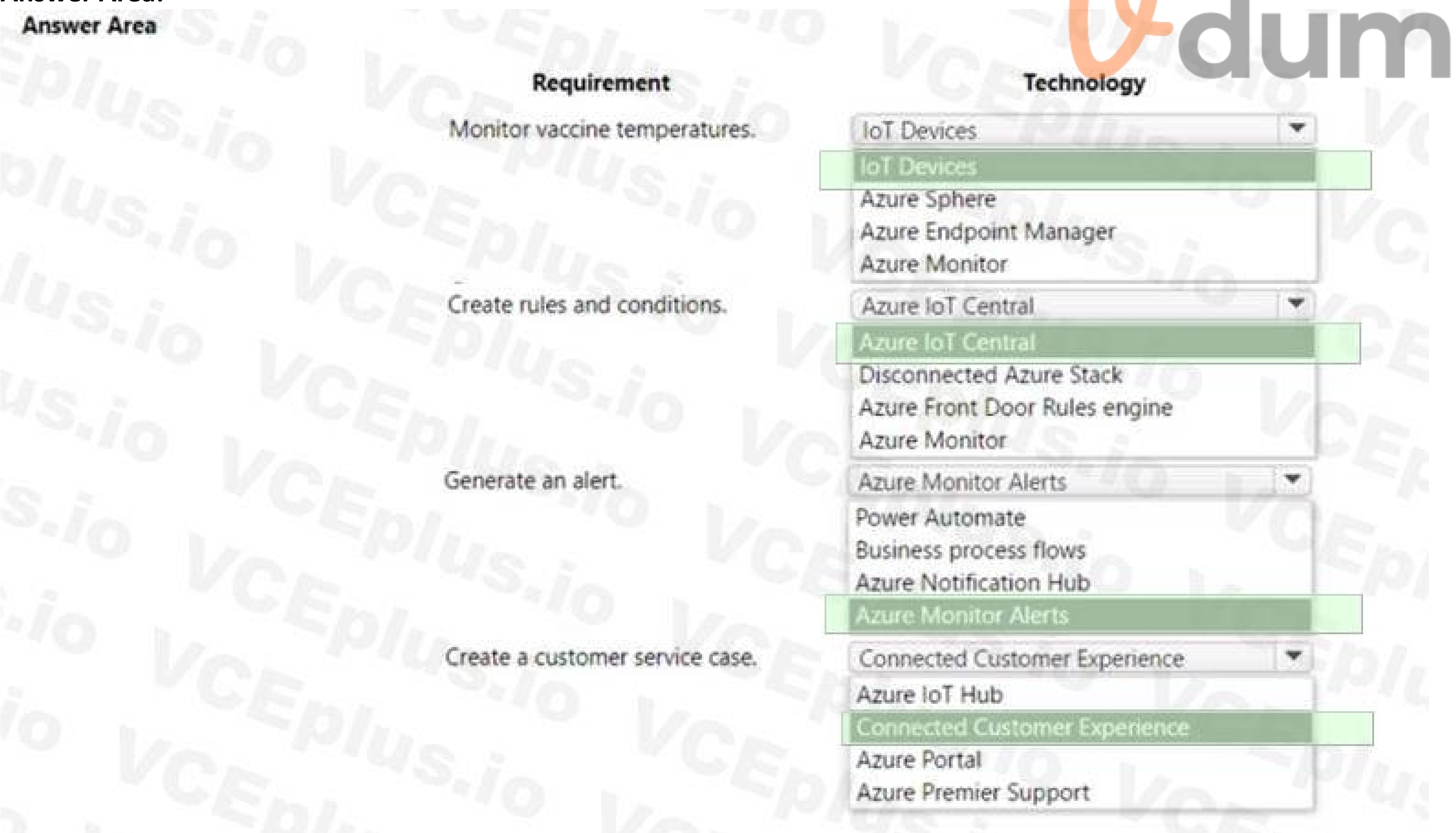
QUESTION 82
HOTSPOT
You work for a pharmaceutical company that distributes vaccines.
Vaccines must be kept below negative 60 degrees Celsius or they cannot be used. The company requires a solution that meets the following requirements:
• Monitor vaccine temperatures during transportation.
• Create a 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.



Hot Area:



Answer Area:



Section:

Explanation:

QUESTION 83
A company that manufactures industrial heating, ventilation, and air conditioning units (HVAC) implements the Dynamics 365 Connected Customer Sen/ice (IoT) add-in to its environment.
The company must enable the system to receive alerts from HVAC units sold to customers who purchased an extended warranty and monitoring service.
You need to enable the device alerts.
Which two actions should you perform? Each correct answer presents part of the solution.
NOTE: Each correct selection is worth one point.

A. Associate the device with a customer account.
B. Add the device to Azure IoT Hub.
C. Add the device to Azure IoT Central.
D. Associate the device with a service level agreement (SLA).

Correct Answer: A, C
Section:

QUESTION 84
You work for a power company that uses Dynamics 365 Customer Service. The company provides outdoor smart light bulbs to its customers. Each bulb includes an IoT sensor with LTE capabilities.
When a light bulb begins to fail, the IoT sensor must create a work order to send the customer a replacement bulb.
You implement Connected Customer Sen/ice with Azure IoT Central and Power Automate, but work orders are not generated.
You need to ensure that work orders are generated.
What must you set for each bulb?

A. Master device
B. Parent device
C. Customer account
D. Contact

Correct Answer: C
Section:

QUESTION 85
DRAG DROP
You are a customer service schedule administrator for a company. The company hires an electrical engineer who will work remotely.
You need to set the resource to enable the engineer to work remotely.
Which three actions should you perform next 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

- Set the skill on the engineer record to **Electrical Engineer**.
- On the resource record, set the Job Title to **Electrical Engineer**.
- On the engineer's contact record, populate the address fields.
- On the resource record, set the Resource Territory to **Home**.
- Create a contact resource and select the engineer's contact record.
- Create a user record named **Electrical Engineer**.
- Create a user resource record and select the new engineer.
- On the resource record, set the start and end location option list to **Resource Address**.

Answer area

Correct Answer:

Actions

- Set the skill on the engineer record to **Electrical Engineer**.
- On the resource record, set the Job Title to **Electrical Engineer**.
- On the engineer's contact record, populate the address fields.
- On the resource record, set the Resource Territory to **Home**.
- Create a contact resource and select the engineer's contact record.

Answer area

- Create a user record named **Electrical Engineer**.
- Create a user resource record and select the new engineer.
- On the resource record, set the start and end location option list to **Resource Address**.

Section:
Explanation:

QUESTION 86

You implement Dynamics 365 Customer Service for a call center.
The call center supervisor has the following requirements for the Customer Service workspace functionality:
• Automate agents' repetitive tasks.
• Enable agents to share knowledge articles with customers.
You need to ensure that the implementation meets the requirements.
Solution: Create a macro with an Omnichannel connector.
Does the solution meet the goal?

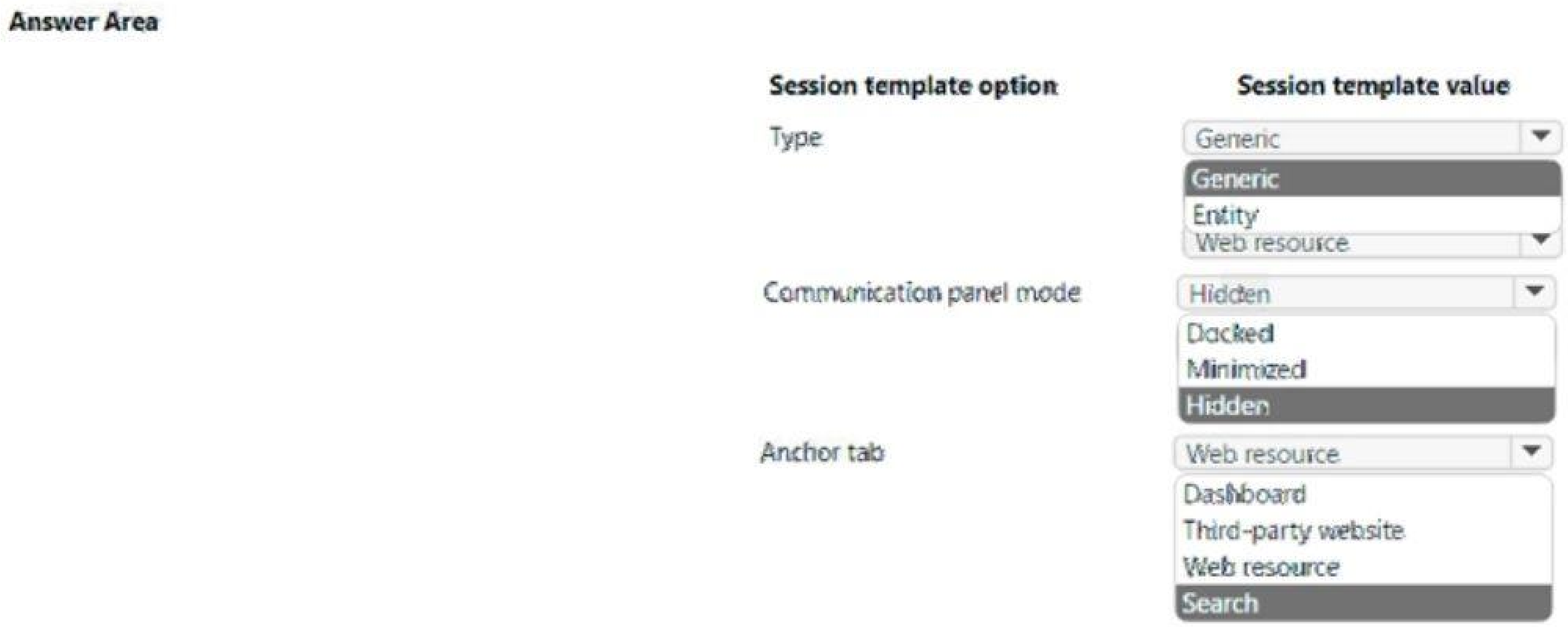
A. Yes

B. No

Correct Answer: A
Section:

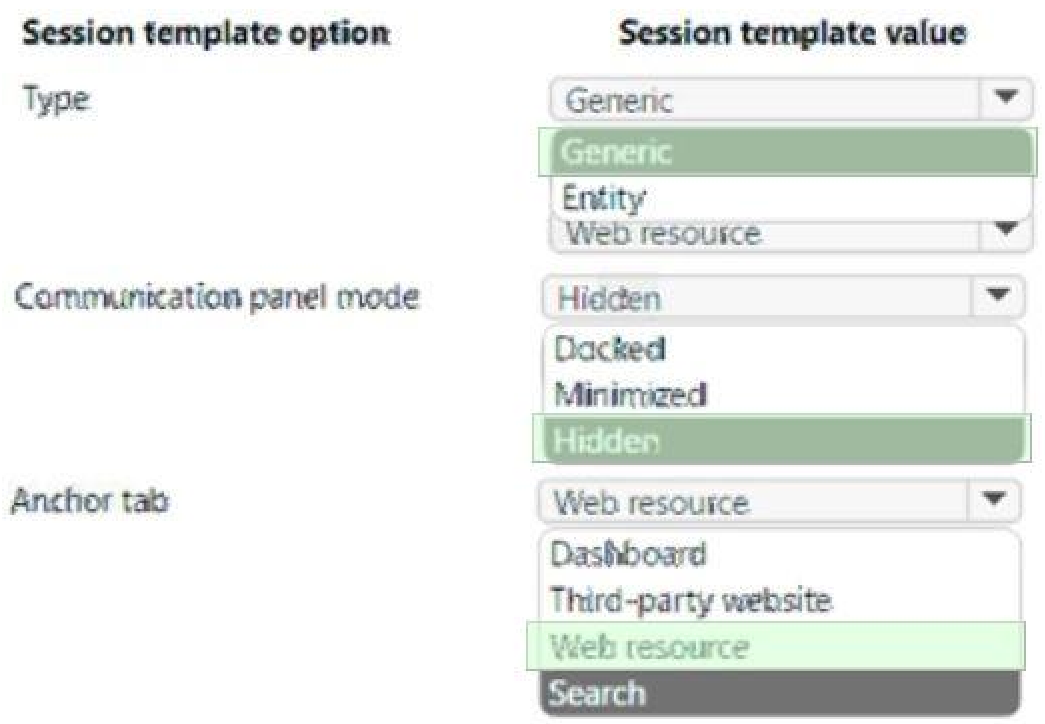
QUESTION 87
HOTSPOT
A credit card company uses Dynamics 365 Customer Service. Agents receive conversations through Omnichannel for Customer Service.
A browser-based internal application Drawees, a history of a customer's payments and credit scores, Vou create an application tab template for the internal application.
if a customer requests a credit limit increase, the agent must use the internal application within Omnichannel for Customer Service to determine eligibility.
Because the internal application requires; maximum) screen space, communications with customers must remain hidden. The internal application must be displayed on the anchor tab.
Once an eligibility check is performed the agent must be able To- chat with the customer again.
You need to create a session template for the company.
How should you configure each area at the template? To answer., select the appropriate options in the answer are a. NOTE: Each correct selection is worth one point.

Hot Area:


Answer Area
Session template option
Session template value
Type
Generic
Generic
Entity
Web resource
Communication panel mode
Hidden
Docked
Minimized
Hidden
Anchor tab
Web resource
Dashboard
Third-party website
Web resource
Search

Answer Area:

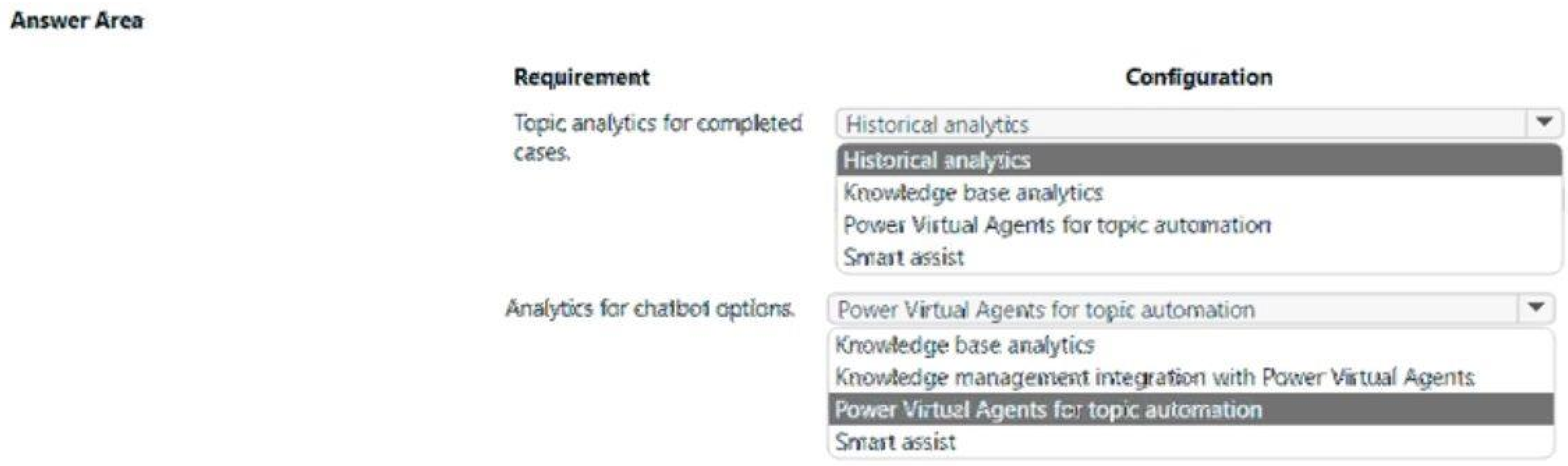
Answer Area



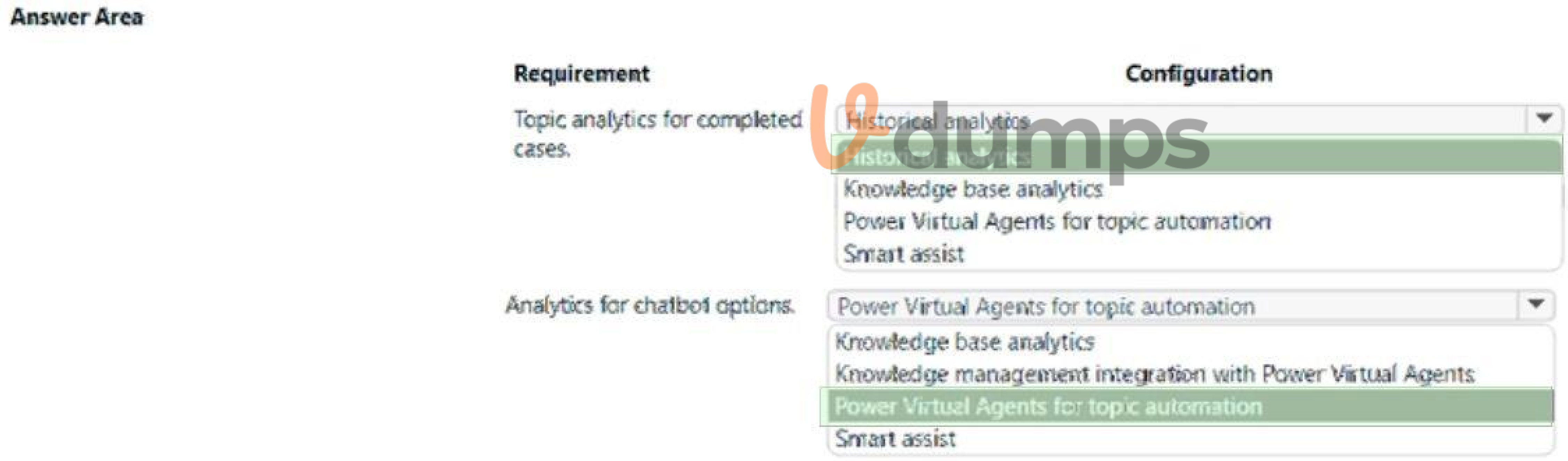
Section:
Explanation:

QUESTION 88
HOTSPOT
A company is implementing Dynamics 36S Customer Service and Rower Virtual Agents for its support desk. Supervisors have the following information requirements:
* Topic analytics for ail cases completed over the last year.
* Analytics for chalbot options chosen from past interactions which customers.
You need to configure the system to meet the requirements.
What should you enable in the configuration? To answer. select the appropriate options in the answer area
NOTE Each connect selection is worth one point.

Hot Area:



Answer Area:



Section:
Explanation:

QUESTION 89
DRAG DROP
You are a functional consultant for a Dynamics 365 Customer Service organization.
You must add the knowledge base search control to the Case entity main form and the Phone call main form.

Select and Place:

Actions

- Open the Article entity.
- In the Controls area, select Add control.
- In the General tab of the Communications and collaboration section, verify that knowledge management is selected.
- Open the entity main form.
- Select the area where you want to place the search control. On the Insert tab, select Knowledge base search.
- In the Set properties dialog box, on the Display tab, specify fields for filter data, knowledge base suggestions, and ratings.

Answer area

Correct Answer:

Actions

- Open the Article entity.
- In the Controls area, select Add control.

Answer area

- In the General tab of the Communications and collaboration section, verify that knowledge management is selected.
- Open the entity main form.
- Select the area where you want to place the search control. On the Insert tab, select Knowledge base search.
- In the Set properties dialog box, on the Display tab, specify fields for filter data, knowledge base suggestions, and ratings.

Section:
Explanation:
In the General tab of the Communications...
Open the entity main form.
Select the area where you want to place the search control...
In the Set properties dailog box, on the Display tab....

QUESTION 90
HOTSPOT
A company that manufactures industrial heating, ventilation, and air conditioning (HVAC) equipment is implementing Dynamics 365 Connected Customer Service.
The solution must meet the following requirements:
* Track and report changes in readings that come from the units.
* Send alerts when readings are outside of set tolerances
* Provide historical tracking of readings for trend analysis.
* Send firmware updates as needed.
You need to configure the required component

Which component 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	Component
Enable units to automatically send alerts.	Azure IoT Central
Deliver firmware updates to connected units.	Azure IoT Hub
Track unit reading for trend analysis.	Azure SQL database

Answer Area:

Answer Area

Requirement	Component
Enable units to automatically send alerts.	Azure IoT Central
Deliver firmware updates to connected units.	Azure IoT Hub
Track unit reading for trend analysis.	Azure SQL database

Section:
Explanation:

QUESTION 91
A customer has a Customer Service environment.
The customer plans to use service scheduling.
You need to install the service scheduling.
What should you use to install the service scheduling?

A. Business Management settings
B. AppSource
C. Power Platform admin center
D. Process Center

Correct Answer: C
Section:

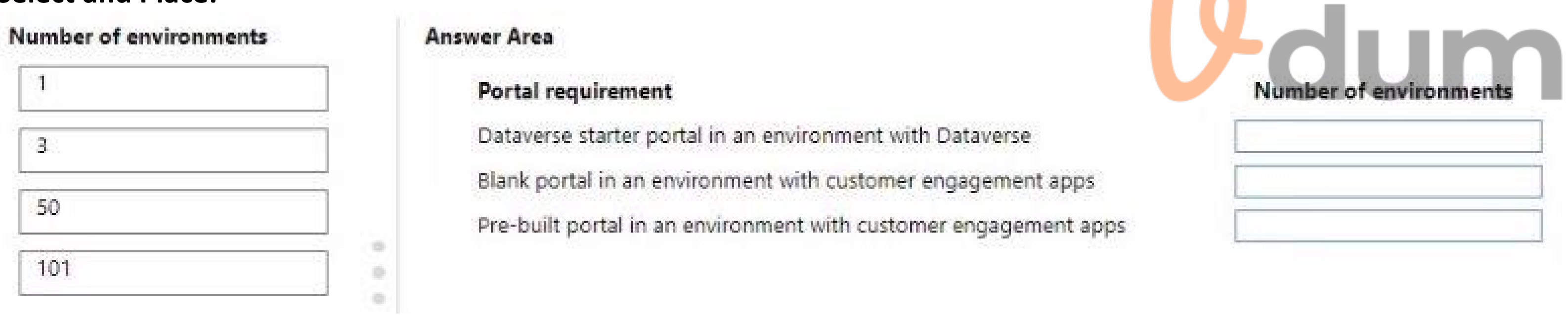
QUESTION 92
A company uses Dynamics 365 Customer Service.
Agents provide incorrect responses when replying to customer issues.
You need to configure quick replies.
What should you do?

A. Select a tag for each quick reply.
B. Create a new quick reply with the category name as the title.
C. Add a slug.
D. Add a quick reply to a workstream.

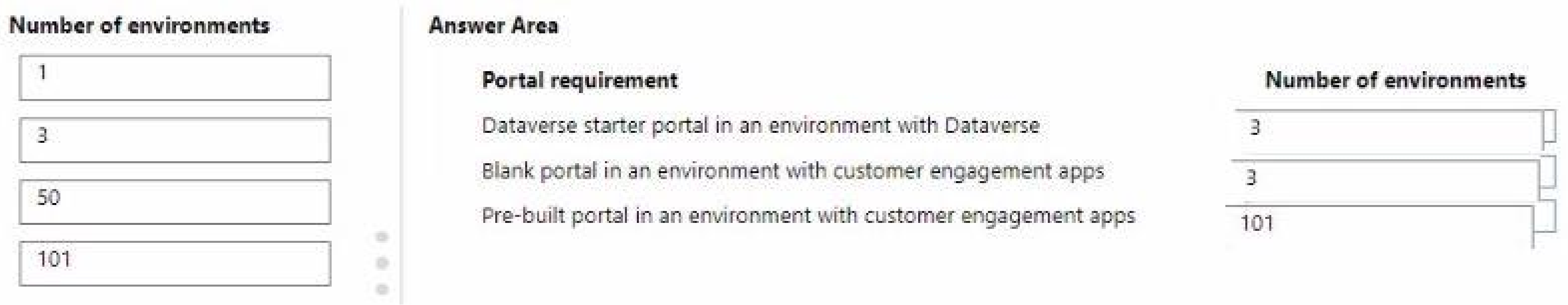
Correct Answer: A
Section:

QUESTION 93
DRAG DROP
A company that operates in 101 countries/regions globally uses Dynamics 365 Customer Service. The countries/regions currently use the same environment.
An administrator plans the deployment of additional portals to support customer service processes.
Each country/region requires the following:
* A Microsoft Dataverse starter portal in an environment with Dataverse
* A blank portal in an environment with customer engagement apps
* A pre-build portal in an environment with customer engagement apps
You need to determine the minimum number of environments required.
How many environments will you need? To answer, drag the appropriate number to the portal requirements. Each number of 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:

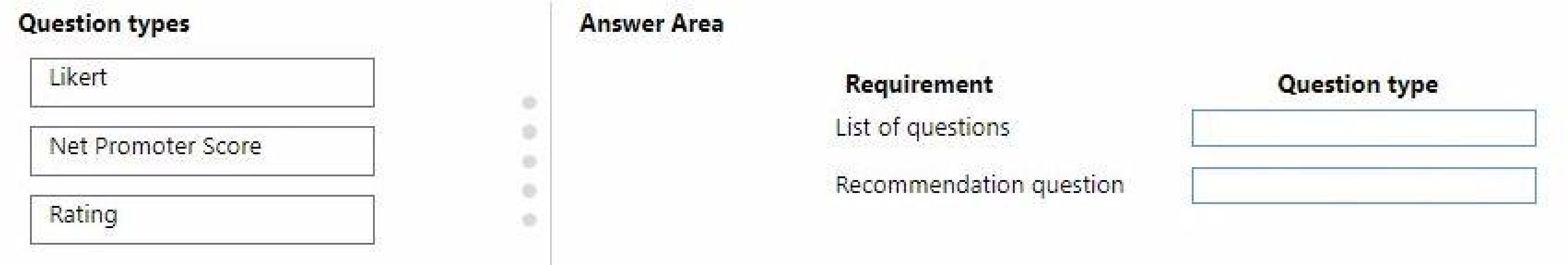


Section:
Explanation:

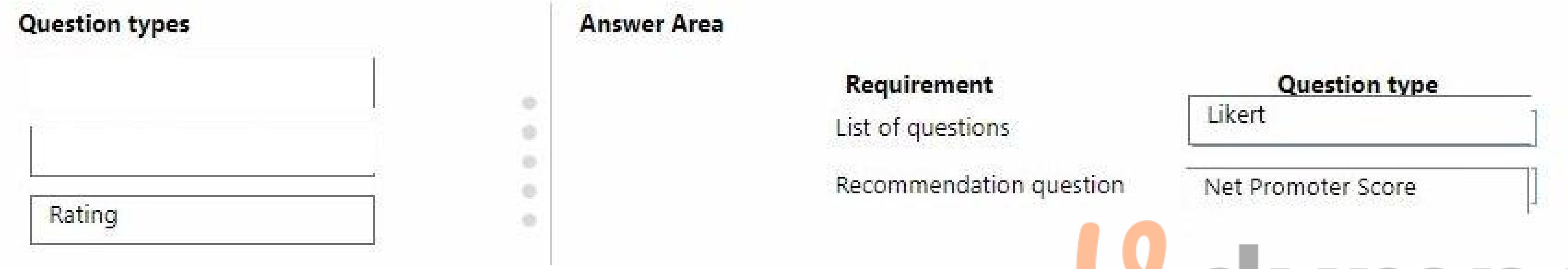
QUESTION 94
DRAG DROP
Your company uses Dynamics 365 Customer Service.
The company wants to send a customer survey to each customer when a case is closed. The survey must include the following:
* An area with a list of questions that rate the answers as poor, average, or great.

* 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:



Correct Answer:



Section:
Explanation:

QUESTION 95
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?

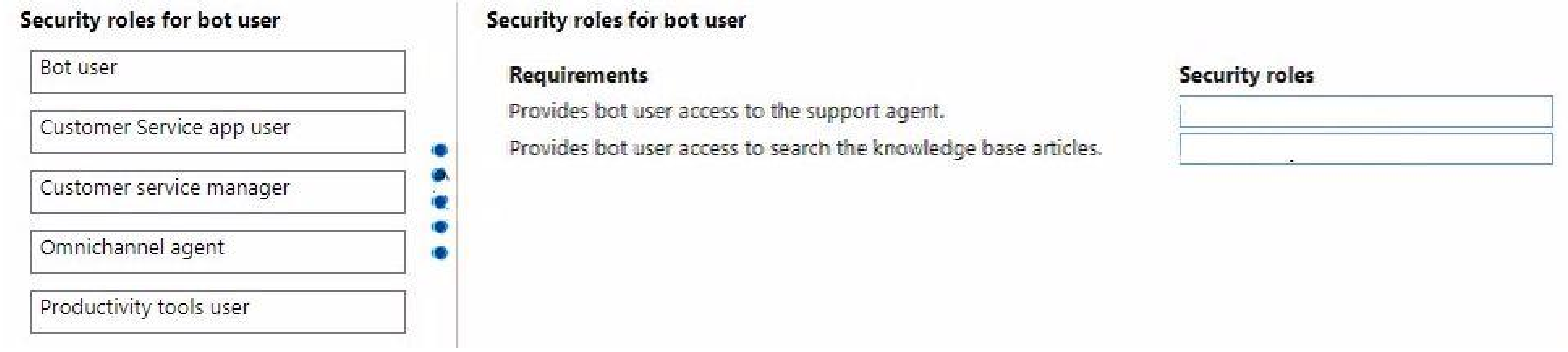
A. Create a Power Automate flow.
B. Set up a business rule to hide the column if it contains data.
C. Set up field-level security.
D. Remove the column from the form.

Correct Answer: C
Section:

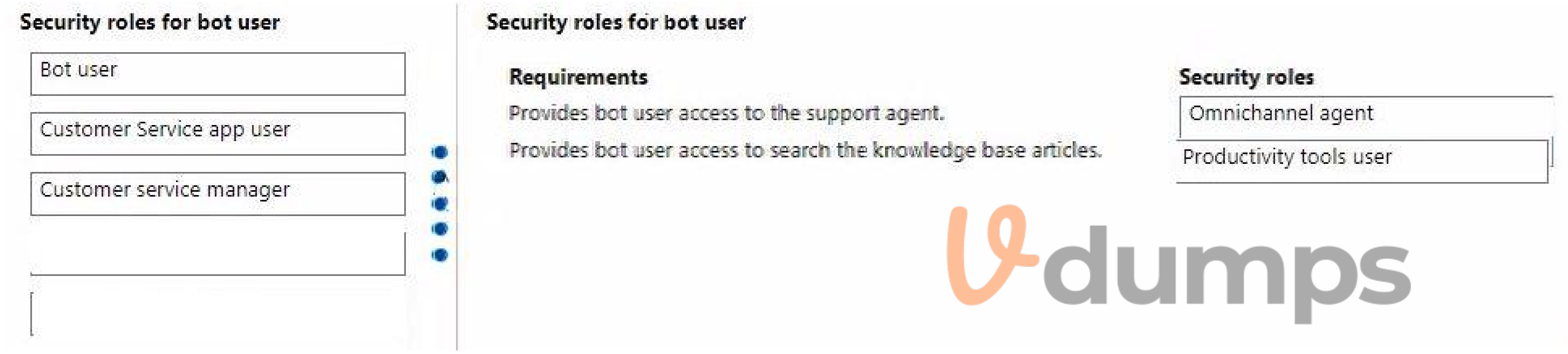
QUESTION 96
DRAG DROP
A company uses Customer Service.
The company plans to enable a customer service agent in Omnichannel.
You need to identify the security roles that are required for the bot user.
What should you identify? To answer, move the appropriate security roles to the correct requirements. 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:



Correct Answer:



Section:
Explanation:

QUESTION 97
A company uses Dynamics 365 Customer Service.
Customer Service workspaces must have custom navigation that meets the following requirements:
* An application must be opened as an anchor tab in the application tab panel.
* Three additional application tabs must be opened when a session begins.
* The default mode of the communication panel must be set to Docked.
You need to determine which tool and feature to use to meet all requirements.
Which two tools/features should you use? Each correct answer presents a complete solution.
NOTE: Each correct selection is worth one point.

A. session templates in Customer Service admin center
B. application tab templates in Customer Service admin center
C. session templates in App Profile Manager
D. application tab templates in App Profile Manager

Correct Answer: A, C
Section:

QUESTION 98
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.
A company has a Customer Service environment and implements historical analytics reports.
Users report that they are not able to access the historical analytics reports.
You need to ensure users can access the reports.
Solution: Modify the historical analytics report to display to the users.
Does the solution meet the goal?

A. Yes
B. No

Correct Answer: B
Section:

QUESTION 99
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.
A company has a Customer Service environment and implements historical analytics reports.
Users report that they are not able to access the historical analytics reports.
You need to ensure users can access the reports.
Solution: Add the users to the customer service representative security role.
Does the solution meet the goal?

A. Yes
B. No

Correct Answer: A
Section:

QUESTION 100
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.
A company has a Customer Service environment and implements historical analytics reports.
Users report that they are not able to access the historical analytics reports.
You need to ensure users can access the reports.
Solution: Share the historical analytics report with the users.
Does the solution meet the goal?

A. Yes
B. No

Correct Answer: A
Section:

QUESTION 101

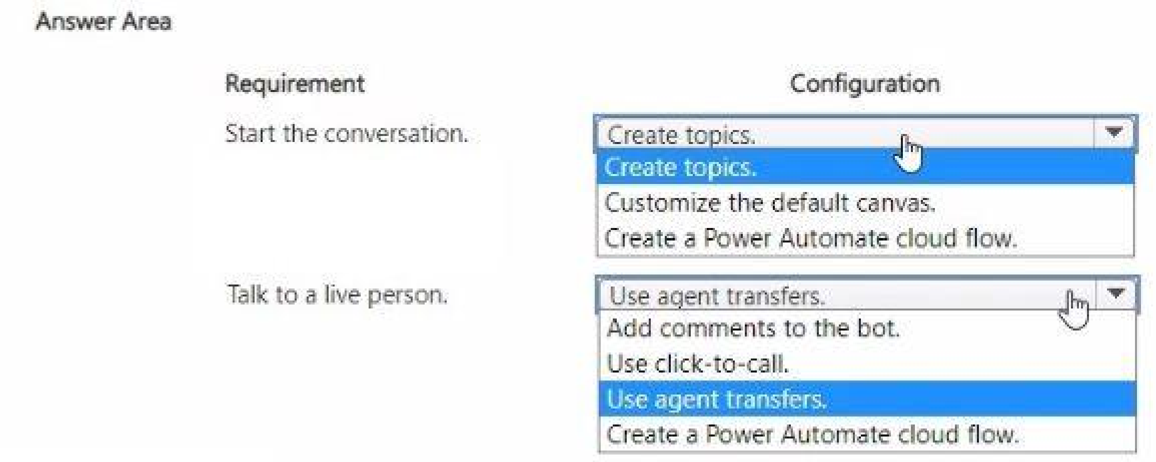
A company uses Dynamics 365 Customer Service. The app is shared by agents and the inventory department. The inventory department manages the products- The agents have read-only access.
Agents must have access to the products to add the products to cases. The agents do not need to view the products in the site map.
You need to prevent agents from viewing products in the site map while maintaining the ability for the inventory department.
What should you do?

A. Configure the site map to remove the subarea where the product is displayed.
B. Set product privileges to Basic for the agents.
C. Set product privileges to Local for the agents.
D. Configure the site map subarea privileges of the product table.

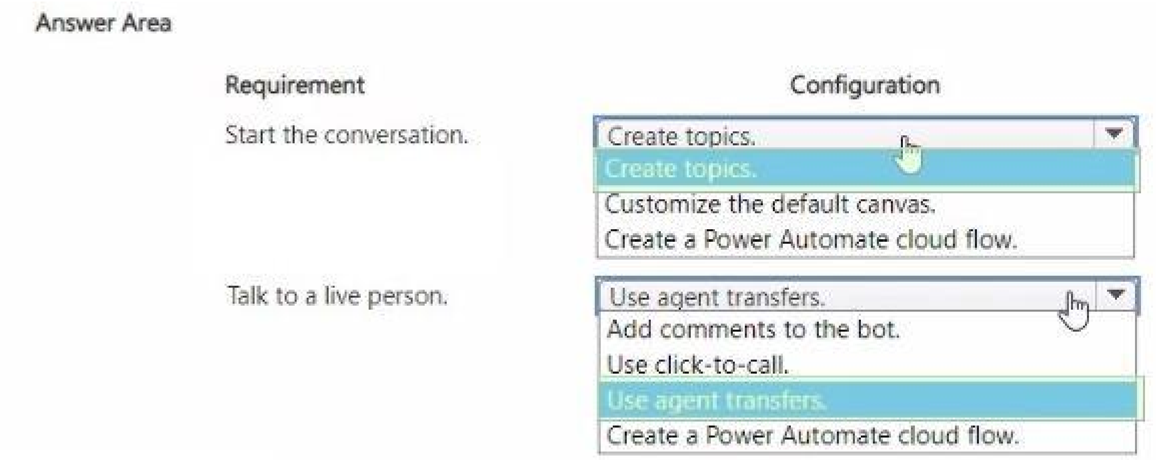
Correct Answer: A
Section:

QUESTION 102
HOTSPOT
You ate creating a bot by using Power Virtual Agents to work within Dynamics 365 Customer Service. The bot must support voice and chat capabilities. The bot must also meet the following requirements:
* When a user starts the conversation, the bot should ask if they need help with installation or support.
* The user must be able to talk to a live person when requested.
You need to configure the bot.
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:

QUESTION 103
A customer has a Customer Service environment. The customer is using service scheduling to manage appointments. You need to add new facilities for service scheduling. Which security role is required to add new facilities?

A. Customer service scheduler
B. Sequence manager
C. Scheduler
D. Scheduler manager

Correct Answer: C
Section:

QUESTION 104
You are setting up knowledge management in Dynamics 365 Customer Service.
Management wants to view the statistics on which keywords are searched the most by agents when they use the knowledge base. You need to ensure that management can view the top search words. Which two steps should you configure? Each correct answer presents part of the solution. NOTE: Each correct selection is worth one point.

A. Enable knowledge analytics.
B. Select Knowledge search analytics after adding the Additional features.
C. Add Knowledge Suggestion Section Control.
D. Enable historical analytics.
E. Enable knowledge article suggestions.

Correct Answer: A, B
Section:

QUESTION 105
A company is implementing Dynamics 365 Customer Service workspaces.
As a customer service representative, you must be able to view and work on more than one work item at a time. You need to navigate between the work items that are active in the workspace. Which two methods can you use? Each correct answer presents a complete solution. NOTE: Each correct selection is worth one point.

A. Select the workspace app tile.
B. Select the session tab.
C. Select the session pane list.
D. Select the Dynamics 365 drop-down navigation.

Correct Answer: B, C
Section:

QUESTION 106
DRAG DROP
A company has a Customer Service deployment.
The company plans to provide instructions for customer service agents.
You need to apply the security roles for agents to configure and access agent scripts.
Which security roles should you use? 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:

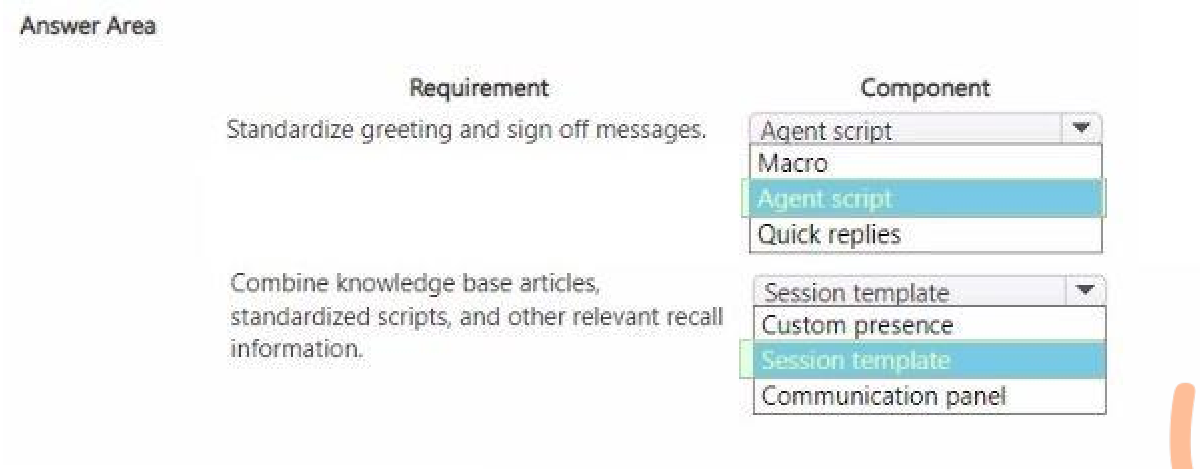
Correct Answer:

Section:
Explanation:

QUESTION 107
HOTSPOT
A company uses Omnichannel for Customer Service.
The company experiences increased incoming live chats from the company website regarding several product recalls. To handle these calls, the company designates agents who have specialized training to manage the conversations.
The conversations must meet the following requirements:
* Calls must be routed to the designated agents.
* Agents must follow legally approved standardized answers to customer questions.
* Agents must be able to reference several knowledge base articles associated with the recalls quickly.
* Greeting and sign off messages must be standardized.
You need to configure the system.
Which components 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:



Section:
Explanation:

QUESTION 108
You are implementing Omnichannel for Customer Service.
The customer service supervisor wants to change one of the intraday KPI calculation methods. You need to modify the supervisor dashboard with the new KPI. Which tool should you use?

A. Report Wizard
B. Power Bl Pro
C. Power Platform Maker portal
D. Supervisor settings

Correct Answer: B
Section:

QUESTION 109
DRAG DROP
A company has a Customer Service environment
The company plans to implement Customer Service Analytics dashboards.
You need to configure the dashboards in Power Bl.
Which order should you perform the actions in? 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

- Install the Customer Service Analytics app.
- Connect Dynamics 365 to the Customer Service Analytics app.
- Configure the Power BI semantic model refresh frequency.
- Enable Power BI reporting and add the Power BI dashboard to the Customer Service Hub.
- Publish the application.

Customer Service Analytics dashboards

Correct Answer:

Actions

Customer Service Analytics dashboards

- Install the Customer Service Analytics app.
- Connect Dynamics 365 to the Customer Service Analytics app.
- Configure the Power BI semantic model refresh frequency.
- Enable Power BI reporting and add the Power BI dashboard to the Customer Service Hub.
- Publish the application.

Section:

Explanation: