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Microsoft Dynamics 365 Fundamentals Customer Engagement Apps (CRM)

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QUESTION 1

DRAG DROP

A company manufactures environmental sensors that can be monitored remotely.

Match each component to its definition.

Instructions: To answer, drag the appropriate component from the column on the left to its definition on the right. Each component may be used once, more than once, or not at all. Each correct match is worth one point.

NOTE: Each correct selection is worth one point.

Select and Place:

Answer Area

Components	Definition	Component
Azure IoT Hub	Service for integration environmental sensors with Dynamics 365 Customer Service.	
Azure IoT Central	Service for configuring integrations between the Customer Service app and environmental sensors.	
Service-level agreement	Rules that trigger on actions in the Customer Service app.	
Power Automate	Rules and actions that execute the integration between environmental sensors and the Customer Service app.	

Correct Answer:

Answer Area

Components	Definition	Component
Azure IoT Hub	Service for integration environmental sensors with Dynamics 365 Customer Service.	Azure IoT Hub
Azure IoT Central	Service for configuring integrations between the Customer Service app and environmental sensors.	Azure IoT Central
Service-level agreement	Rules that trigger on actions in the Customer Service app.	Power Automate
Power Automate	Rules and actions that execute the integration between environmental sensors and the Customer Service app.	Azure IoT Central

Reference: https://docs.microsoft.com/en-us/dynamics365/customer-service/cs-iot-overview

QUESTION 2

HOTSPOT

You are creating segments in Dynamics 365 Marketing.

For each of the following statements, select Yes if the statement is true. Otherwise, select No.

NOTE: Each correct selection is worth one point.

Hot Area:

Answer Area

Statements	Yes	No
You can set up dynamic segments to include contacts, leads, and accounts.	○	○
When you are using a static segment, you must manually pick the members to be included or select by query.	○	○
The scope of a segment determines if the segment is dynamic or static.	○	○

Correct Answer:

Answer Area

Statements	Yes	No
You can set up dynamic segments to include contacts, leads, and accounts.	●	○
When you are using a static segment, you must manually pick the members to be included or select by query.	○	●
The scope of a segment determines if the segment is dynamic or static.	○	●

Box 1: Yes

Segments let you create groups of related contacts that you can target with customer journeys. Segments are created

using the segment designer. One way to build segments is by querying across related entities including contacts, leads, accounts, events, marketing lists, and more.

Note: Dynamic segments are set up by using logical expressions, such as "all contacts from New York" or "all contacts who like The Mets." Membership in dynamic segments changes constantly to reflect new or removed contacts and updated contact information. Both demographic and firmographic segments are examples of dynamic segments.

Box 2: No

Static segments establish a static list of contacts who are selected on a per-contact basis rather than created logically based on field values. Marketers and salespeople might create and populate a static list based on private knowledge or offline interactions.

Static segment: Creates a segment where you manually select each member rather than creating a logical query that automatically adds them.

Box 3: No

Segment type, not scope decides:

Create and go live with a new segment

Read this section to get a basic overview of how to create a segment and start it running so you can see its members and use it to target a customer journey.

Go to Marketing >Customers > Segments to open a list of current segments.

Select New to start creating your new segment, and select the type of segment you would like to create: Dynamic segment: Creates a dynamic segment that can query contact records and interaction records, as well as include, intersect, or exclude contacts in existing segments. While querying contact records, you can add relations as needed to create a more complex query. Static segment: Creates a segment where you manually select each member rather than creating a logical query that automatically adds them.

Etc.

Reference: https://learn.microsoft.com/en-us/dynamics365/marketing/segmentation-lists-subscriptionshttps://learn.microsoft.com/en-us/dynamics365/marketing/segmentation-lists-subscriptions

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QUESTION 3

DRAG DROP

A company uses Dynamics 365 Customer Service. Incoming case records are assigned to queues.

Cases need to be assigned to employees based on predetermined criteria.

You need to determine which routing rules to configure.

Which routing rules should you configure?

To answer, drag the appropriate rule types to the correct needs. Each rule 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:

Answer Area

Rule Types	Need	Rule Type
Prioritization	Updating the priority column on a case based on existing information.	
Skill-based routing	Assignment order when agents have capacity available.	
Work classification		

Correct Answer:

Answer Area

Rule Types	Need	Rule Type
	Updating the priority column on a case based on existing information.	Prioritization
	Assignment order when agents have capacity available.	Skill-based routing
Work classification		

Box 1: Prioritization

Prioritization: Lists the prioritization rule that was applied if any. Work items are routed according to their priority.

Box 2: Skill-based routing

In the customer service center, your agents have different skill sets and abilities. The customers who reach out to the contact center might have different needs. Skill-based routing lets your customer service center distribute work items

(conversations) to the agent who is most qualified to solve the issue. Skill-based routing improves the quality of customer service by automatically distributing work items to the agent who has the skills necessary to do the work.

Reference: https://learn.microsoft.com/en-us/dynamics365/customer-service/unified-routing-diagnostics
https://learn.microsoft.com/en-us/dynamics365/customer-service/overview-skill-work-distribution

QUESTION 4

DRAG DROP

All employees at a company use Office 365. You are setting up Dynamics 365 Sales for the company. Only some employees will have licenses for Dynamics 365 Sales.

You need to recommend solutions for the company.

What should you recommend? To answer, drag the appropriate solutions to the correct requirements. Each solution 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:

Answer Area

Solutions	Requirement	Solution
Microsoft Teams	Ensure that all employees can participate in the lead qualification process	
LinkedIn Sales Navigator	Display the latest news about the currently selected Lead record to Dynamics 365 Sales users.	
Microsoft Dataverse	Acquire relevant account information from Dynamics 365 Finance.	
Knowledge Articles		

Correct Answer:

Answer Area

Solutions	Requirement	Solution
	Ensure that all employees can participate in the lead qualification process	Microsoft Teams
	Display the latest news about the currently selected Lead record to Dynamics 365 Sales users.	LinkedIn Sales Navigator
Knowledge Articles	Acquire relevant account information from Dynamics 365 Finance.	Microsoft Dataverse

QUESTION 5

HOTSPOT

You plan to implement Dynamics 365 Customer Service.

For each of the following statements, select Yes if then statement is true. Otherwise, select No.

NOTE: Each correct selection is worth one point.

Hot Area:

Answer Area

Statement	Yes	No
You must install the knowledge base solution before the knowledge base feature is available in Dynamics 365 Customer Service.	○	○
Omnichannel for Customer Service is automatically installed when you install Dynamics 365 Customer Service.	○	○

Correct Answer:

Answer Area

Statement	Yes	No
You must install the knowledge base solution before the knowledge base feature is available in Dynamics 365 Customer Service.	○	●
Omnichannel for Customer Service is automatically installed when you install Dynamics 365 Customer Service.	○	●

Reference: https://docs.microsoft.com/en-us/dynamics365/customer-service/omnichannel-provision-license

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