MB-910^{Q&As}

Microsoft Dynamics 365 Fundamentals Customer Engagement Apps (CRM)

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QUESTION 1

DRAG DROP

A company uses Dynamics 365 Customer Service. The company only uses out-of-the-box features.

A customer service manager plans to use dashboards for the management team.

You need to describe which visualization should be used for each requirement.

Which visualizations should you use? To answer, drag the appropriate visualization to the correct requirement. Each visualization 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:

Visualizations

| Historical analytics |
| Standard dashboard |
| Interactive experience dashboard |

Answer Area

Requirement	Visualization
AI-generated case insights.	Visualization
List of active cases and activities refined by using a global filter.	Visualization

Correct Answer:

Visualizations

| Standard dashboard |

Answer Area

Requirement	Visualization
AI-generated case insights.	Historical analytics
List of active cases and activities refined by using a global filter.	Interactive experience dashboard

Explanation:

Box 1: Historical analytics AI-generated case insights. The insights dashboards for Customer Service contain various charts and metrics to help you understand the factors that can improve customer service for your organization. Key performance indicators and visual breakdowns of your

organization\'s support cases are coupled with AI-generated insights on cases and topics that contribute to overall trends.

The Customer Service dashboards give you a performance summary and detailed reports on cases, agents, and topics. You can make changes to the visual display of the dashboards and also save your personalized views as bookmarks.

Customer Service historical analytics reports

The following dashboard reports are available for Customer Service historical analytics: Summary

The Summary dashboard gives you a broad overview of the customer service experience in your organization. It uses AI technology to show you topics that are generating the highest volume and emerging topics with the highest rate of change in volume.

Box 2: Interactive experience dashboard Interactive experience dashboards can be a one-stop workplace for app users, such as service reps, to see workload information and take action. They\'re fully configurable, security-role based, and deliver workload information across multiple streams in real time. Interactive dashboard users don\'t need to page through the application looking for a particular record; they can act on it directly from the dashboard.

The interactive experience dashboards come in two forms: multi-stream and single-stream. In addition, multi-stream dashboards can be home page or entity-specific dashboards. The entity-specific dashboards are configured in a different part of the user interface and partially preloaded with the entity-specific configuration information.

The multi-stream dashboards display data in real time over multiple data streams. There\'s no limit on how many streams you can configure on the dashboard. The data in a stream can be based only on one entity, but, each stream can be based on a different entity. In the entity-specific dashboards, all streams are based on the same entity. The data flows from various views or queues, such as My Activities, My Cases, or Cases in the Banking Queue.

Reference: https://learn.microsoft.com/en-us/dynamics365/customer-service/customer-service-analytics-insights-csh https://learn.microsoft.com/en-us/dynamics365/customerengagement/on-premises/customize/configure-interactive-experience-dashboards

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QUESTION 2

A company allows customers to submit cases through its website. A case type field on the webform has sales and service options. You need to add the case automatically to the sales or service queue based on the field value, using only out-of-the-box functionality. What should you configure?

A. record creation and update rule

B. sequence

C. routing rule

D. assistant

Correct Answer: A

Explanation:

Every organization has multiple applications to capture customer interactions. The ability to channel external data into Microsoft Dataverse records can significantly improve the efficiency of your sales, marketing, and service teams, and

increase the quality of your data. You can now direct this data from various applications and external sources into Dataverse with the help of record creation and update rules.

By using record creation and update rules in Dynamics 365 Customer Service, you can automatically create or update system or custom records from incoming activities, such as emails, social activities, or custom activities, without writing

any code. Not just that, you can set up the rule to convert the incoming activity into multiple records. For example, you can create a case and a lead from a single social activity.

Reference:

https://learn.microsoft.com/en-us/dynamics365/customer-service/set-up-rules-to-automatically-create-or-update-records

QUESTION 3

A potential customer delays their decision to commit to a big multi-year contract.

You want to find other colleagues who have interacted with the potential customer to discuss strategies.

Which app should you recommend?

A. Customer Service Insights

B. Sales Insights

C. Power Virtual Agents

D. Market Insights

Correct Answer: B

QUESTION 4

A company uses Dynamics 365 Marketing.

You must choose a real-time marketing customer journey type to start the journey.

Which two journey types you can use? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

A. Event-based

B. Audience-based

C. Scheduled

D. Customer onboarding

Correct Answer: AB

A: Triggering a custom event allows you to use activate a custom event at any point in the customer journey.

B: Segment-based journey Audience: The audience property lets you specify the segment of people that will start the journey. Segment-based journeys support segments from outbound marketing as well as segments created in Dynamics 365 Customer Insights. The journey will use audience data based upon the segment selected.

Reference: https://docs.microsoft.com/en-us/dynamics365/marketing/real-time-marketing-tile-reference

QUESTION 5

HOTSPOT

You are teaching a Dynamics 365 Sales course to app makers.

You explain the following data configuration:

The customer\'s name is the company name.

Phone calls and appointments with companies and their employees can be associated with the appropriate records.

You need to specify where customer and phone call data are stored.

In which tables is the data stored?

To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

Data   **Table**

Customer

| Users |
| Contact |
| Account |
| Team |

Phone calls

| Activity |
| Subject |
| Annotation |
| Account |

Correct Answer:

Data   **Table**

Customer

| Users |
| Contact |
| Account |
| Team |

Phone calls

| Activity |
| Subject |
| Annotation |
| Account |

Explanation:

Box 1: Accounts

Customer

Account and contact records store much of the information that you and your team collect from your customers.

You store data about companies you do business with in accounts.

Box 2: Activity

Phone calls

The activity and notes area helps you keep track of all the interactions with your customers. Record all important conversations with the customer or the communication with your team members regarding a record in Dynamics 365 Customer

Engagement (on-premises). Add a phone call, task, notes, email, or appointments right within the case, account, contact, lead, or opportunity records without navigating to a different area and opening another form.

All activities that you add from within a record appear in the Activities area.

Reference:

https://learn.microsoft.com/en-us/dynamics365/customerengagement/on-premises/basics/how-data-organized https://learn.microsoft.com/en-us/dynamics365/customerengagement/on-premises/basics/add-phone-call-task-email-appointment-activity-case-record

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