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Microsoft Dynamics 365 Fundamentals Customer Engagement Apps (CRM)

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QUESTION 1

HOTSPOT

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
Knowledge articles are available to all users once they are created.	O	O
Users can search for knowledge articles from Dynamics 365 Customer Service and the Customer portal.	O	O
Knowledge articles can have multiple versions.	O	O

Correct Answer:

Answer Area

Statements	Yes	No
Knowledge articles are available to all users once they are created.	O	**O**
Users can search for knowledge articles from Dynamics 365 Customer Service and the Customer portal.	**O**	O
Knowledge articles can have multiple versions.	**O**	O

Explanation:

Box 1: No

You have to publish them first.

Publish knowledge articles

After the content in the article is complete and reviewed, you can publish the article to the portal to make it available to your customers. You can publish the article immediately or schedule it for a later time.

Box 2: Yes

You can search knowledge articles in Customer Service Hub, Customer Service workspace, and Omnichannel for Customer Service to help answer a customer\\'s question or solve an issue.

You can use external portal to publish the knowledge articles.

Box 3: Yes

Create and manage article versions

Article versioning helps you manage updates to your knowledge articles without disrupting the live or published articles. By creating major and minor versions of a knowledge article, you can keep your articles up to date with the latest

information while keeping track of changes throughout the lifecycle of your products and services.

This capability helps you to keep accurate records of the features your organization provides and go back to previous versions if you need to.

Reference:

https://learn.microsoft.com/en-us/dynamics365/customer-service/publish-ka

https://learn.microsoft.com/en-us/dynamics365/customer-service/ka-versions

QUESTION 2

A company uses Dynamics 365 Marketing. The company uses a third-party app to send email surveys to prospects to better understand their business needs.

There is currently no link to prospect records and users report that the survey management process is manual and is difficult to manage.

You need to automate the survey process and streamline collection and analysis of responses.

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 Customer Voice to compile results from the existing third-party app.

B. Use Power Automate to automatically send Customer Voice surveys.

C. Create a survey in Dynamics 365 Marketing and create a campaign to send it to out and collect data.

D. Use Customer Voice to collect and analyze survey results.

E. Create surveys in Dynamics 365 Marketing by using Questionnaire.

Correct Answer: DE

QUESTION 3

Which two components are included in Dynamics 365 Marketing?

Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

A. Customer Voice survey

B. Customer Service Hub

C. Enterprise Asset Management

D. Event management

Correct Answer: AD

Reference: https://docs.microsoft.com/en-gb/dynamics365/marketing/overview

QUESTION 4

A company implements Dynamics 365 Customer Service for their support desk.

Agents resolve issues based on their own personal experiences or they must try to recreate the problem. This is causing customer satisfaction issues as resolution time is longer than expected and not consistent.

You need to implement a solution to improve consistency of answers and ensure that agents can share their answers.

What should you implement?

A. Service level agreements

B. Customer Service Insights

C. Power Automate to transfer cases

D. Knowledge base management

Correct Answer: C

QUESTION 5

DRAG DROP

A company purchases Dynamics 365 Sales and Dynamics 365 Marketing. The company wants to be able to host webinars and events but is concerned about controlling costs.

You need to recommend solutions to meet the company\'s requirements.

Which products should you recommend? To answer, drag the appropriate products to the correct features. Each

product 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:

Products

Dynamics 365 Marketing

Customer Insights

Dynamics 365 Sales

Dynamics 365 Sales Insights

Requirement	Product
View costs associated with speakers.	Product
Create waitlists for events.	Product

Correct Answer:

Products

Dynamics 365 Marketing

Customer Insights

Dynamics 365 Sales

Dynamics 365 Sales Insights

Requirement	Product
View costs associated with speakers.	Dynamics 365 Marketing
Create waitlists for events.	Dynamics 365 Marketing

QUESTION 6

A company uses Dynamics 365 Customer Service.

The company plans to use support queues to organize and monitor the progress of cases. Customer support agents will select cases from queues in which they are members.

Agents release case items if they are not able to continue working on a case.

Which statement describes what happens when a case item is released from the queue?

A. The case continues to remain in the agent\\'s personal queue until someone else selects the item from the queue.

B. The case is removed from all queues.

C. The case is removed from the agent\\'s personal queue and returned to the original support queue.

Correct Answer: C

Reference: https://docs.microsoft.com/en-us/learn/modules/using-dynamics-365-queues-to-manage-case-workloads/4-working-with-queues

QUESTION 7

DRAG DROP

You are designing reports for a pharmacy. The pharmacy uses Dynamics 365 Sales.

Match each tool to the reporting requirements.

Instructions: To answer, drag the appropriate tool from the column on the left to the requirements on the right. Each tool may be used once, more than once, or not at all.

NOTE: Each correct match is worth one point.

Select and Place:

Answer Area

Tools	Requirement	Tool
Microsoft Excel		
Power BI	Stakeholders do not have access to the environment. They must be able to view business data that is always up to date.	
Dynamics 365 Sales dashboard	Pharmacists need a list of the number of orders filled and to fill the next day, week, and month as well as a list of prescription drugs that are out of stock.	
Plug-in		

Correct Answer:

Answer Area

Tools	Requirement	Tool
Power BI	Stakeholders do not have access to the environment. They must be able to view business data that is always up to date.	Microsoft Excel
	Pharmacists need a list of the number of orders filled and to fill the next day, week, and month as well as a list of prescription drugs that are out of stock.	Dynamics 365 Sales dashboard
Plug-in		

Reference: https://docs.microsoft.com/en-us/powerapps/user/export-excel-dynamic-worksheet

QUESTION 8

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. Market Insights

C. Power Virtual Agents

D. Sales Insights

Correct Answer: D

Reference: https://docs.microsoft.com/en-us/dynamics365/ai/sales/relationship-analytics#analyze-the-health-and-activity-history-of-a-customer-or-opportunity

QUESTION 9

A company integrates LinkedIn Campaign Manager with Dynamics 365 Marketing.

Which two actions can the company perform using out-of-the-box features?

Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

A. Generate leads from LinkedIn.

B. Create email templates for LinkedIn messages.

C. Schedule and publish social posts.

D. Create and publish events on LinkedIn.

Correct Answer: AC

Reference: https://seelogic.co.uk/technologies/dynamics-365/marketing-on-linkedin-with-dynamics-365-marketing/

QUESTION 10

HOTSPOT

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
The schedule assistant gives preference to specific resources over requirements.	O	O
Requirements trigger the creation of work orders.	O	O
Booking alerts display on the Field Service (Dynamics 365) mobile app.	O	O

Correct Answer:

Answer Area

Statements	Yes	No
The schedule assistant gives preference to specific resources over requirements.	**O**	O
Requirements trigger the creation of work orders.	O	**O**
Booking alerts display on the Field Service (Dynamics 365) mobile app.	**O**	O

Explanation:

Box 1: Yes

The schedule assistant is a semi-automated feature that helps dispatchers assign requirements to ideal resources.

The schedule assistant recommends resources that match criteria, like availability or skills, for requirements. The system also estimates travel time for the recommended resources, which helps dispatchers plan work accordingly.

When the dispatcher identifies the right resource for the job, they book the resource.

Box 2: No

Schedule a work order using the scheduling assistant

From the main menu, select Field Service > Work Orders.

Select a work order from the list, or select the work order number.

On the command bar, select Schedule Assistant.

When the schedule assistant opens, choose the constraints that you will use to query the system to find available resources and time slot options.

Duration: Pulled from the estimated duration on the work order, which is driven by the incidents.

Radius Constraint: Select the radius for the available resources. This defaults from a Field Service setting.

Start and End Days: Choose the date ranges. This is driven from the date window fields on the work order.

Box 3: Yes

Enable push notifications

In the Field Service (Dynamics 365) mobile app, push notifications allow you to send updates to technicians through their mobile phones or tablets. Push notifications use Microsoft Power Automate and can be triggered by many scenarios.

Push notifications can be used to:

Notify technicians they have been assigned a booking.

Remind technicians to enter important business data.

Reference:

https://learn.microsoft.com/en-us/dynamics365/field-service/schedule-assistant

https://learn.microsoft.com/en-us/dynamics365/field-service/schedule-work-order

https://learn.microsoft.com/en-us/dynamics365/field-service/mobile-power-app-push-notifications

QUESTION 11

You have a chart that displays a summary of accounts by industry.

You need a chart that displays the same data grouped by city. You must be able to access the chart at a later date.

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. Expand the existing chart.

B. Edit the existing chart.

C. Select the city field in the drill-down menu.

D. Create a new chart.

Correct Answer: BD

QUESTION 12

HOTSPOT

A company uses Dynamics 365 Sales.

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:

Statement	Yes	No
A business process flow guides you through the out-of-the box lead-to-opportunity sales process when you implement Dynamics 365 Sales.	O	O
You need to manually create an account record when you qualify an out-of-the-box lead as yes.	O	O
By default. the system notifies you if a contact already exists when you are entering a duplicate contact record.	O	O

Correct Answer:

Statement	Yes	No
A business process flow guides you through the out-of-the box lead-to-opportunity sales process when you implement Dynamics 365 Sales.	O	O
You need to manually create an account record when you qualify an out-of-the-box lead as yes.	O	O
By default. the system notifies you if a contact already exists when you are entering a duplicate contact record.	O	O

QUESTION 13

A company uses Dynamics 365 Sales and Dynamics 365 Customer Service.

The management team wants to understand the benefits of the Dynamics 365 App for Outlook.

You need to explain the available features.

Which two features should you explain?

Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

A. Track an email from Outlook to an existing sales order in Dynamics 365 Sales.

B. Create a Dynamics 365 email template.

C. Synchronize an appointment created in Dynamics 365 Sales to Outlook.

D. Synchronize a custom field in the contact table to a user-defined field in Outlook.

Correct Answer: AD

Explanation:

A: You can use Microsoft Dynamics 365 for Outlook to track email messages, contacts, tasks, and appointments. When you track an email message, contact, task, or appointment record, a copy of that record is saved as an activity in Dynamics 365 for Customer Engagement and synchronized with the Outlook record. You can then view and edit that record in Dynamics 365 for Outlook or Customer Engagement. If you sync Outlook on your mobile device, you can also access these records on that device.

With Dynamics 365 App for Outlook, you can:

Link email messages, meetings, and appointments to a row in your app. For example, link an email message to a specific account, opportunity, or case.

View information in the context of an email message, meeting, or appointment.

(D) Synchronize contacts and related information so that Exchange and your app is always up to date.

Add email templates, knowledge articles, and sales literature when you create an email message or set up a meeting.

Note: Use Dynamics 365 App for Outlook and tap the power of Dynamics 365 apps while using Outlook on the desktop, web, or mobile. You can view information about an email or appointment or link it to an opportunity, account, or case in your app.

Reference: https://learn.microsoft.com/en-us/dynamics365/outlook-addin/user-guide/overview-tracking-records
https://learn.microsoft.com/en-us/dynamics365/outlook-app/overview

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QUESTION 14

A company uses Dynamics 365 Sales and Dynamics 365 Customer Service apps.

Technicians doing repair work should not have access to customer orders and invoices.

You need to limit the technicians access to data.

Which feature should you use?

A. Environment-level security

B. Data loss prevention policy

C. Role-based security

D. Row-level security
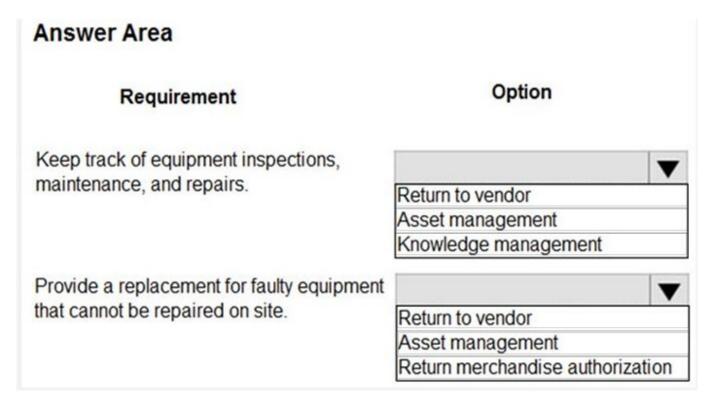
Correct Answer: C

QUESTION 15

HOTSPOT

A company uses Dynamics 365 Field Service. The company manufactures and sells medical equipment to hospitals. The company also manufactures parts for all equipment they sell.

You need to ensure that you can track equipment inspections, maintenance, and repairs. You must also be able to provide a replacement for faulty equipment that cannot be repaired on site.

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

NOTE: Each correct selection is worth one point.

Hot Area:

Answer Area

Requirement	Option
Keep track of equipment inspections, maintenance, and repairs.	Return to vendor Asset management Knowledge management
Provide a replacement for faulty equipment that cannot be repaired on site.	Return to vendor Asset management Return merchandise authorization

Correct Answer:

Answer Area

Requirement	Option
Keep track of equipment inspections, maintenance, and repairs.	**▼** Return to vendor / **Asset management** / Knowledge management
Provide a replacement for faulty equipment that cannot be repaired on site.	**▼** Return to vendor / Asset management / **Return merchandise authorization**

Reference: https://docs.microsoft.com/en-us/dynamics365/field-service/configure-set-up-customer-assets

https://docs.microsoft.com/en-us/dynamics365/field-service/process-return

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