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Microsoft Dynamics 365 for Customer Service (beta)

Sections
1. Topic 1, Perform Configuration
2. Topic 2, Manage cases and the knowledge base
3. Topic 3, Manage queues, entitlements, and SLAs
4. Topic 4, Configure Voice of the Customer

Exam A

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: Configure Dynamics 365 to automatically send responses to customers when the record is created.

Does the solution meet the goal?

A. Yes
B. No

Correct Answer: B
Section: Topic 1, Perform Configuration
Explanation

Explanation/Reference:

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 Email, and then select the queue. Configure autoresponse settings.

solution meet the goal?

A. Yes
B. No

Correct Answer: A
Section: Topic 1, Perform Configuration
Explanation

Explanation/Reference:
References: https://docs.microsoft.com/en-us/dynamics365/customer-engagement/customer-service/automatically-create-case-from-email

QUESTION 3
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: Topic 1, Perform Configuration
Explanation
Explanation/Reference:

QUESTION 4
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: BCD
Section: Topic 1, Perform Configuration
Explanation

Explanation/Reference:

QUESTION 5
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: Topic 1, Perform Configuration
Explanation

Explanation/Reference:
References: https://docs.microsoft.com/en-us/dynamics365/customer-engagement/customize/enhance-business-process-flows-branching

QUESTION 6
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: Topic 1, Perform Configuration
Explanation

Explanation/Reference:

QUESTION 7
DRAG DROP

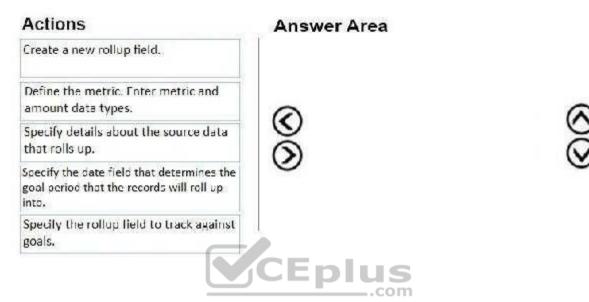You are a Dynamics 365 system administrator.

Your customer service team must define goal metrics to track and measure all resolved cases.

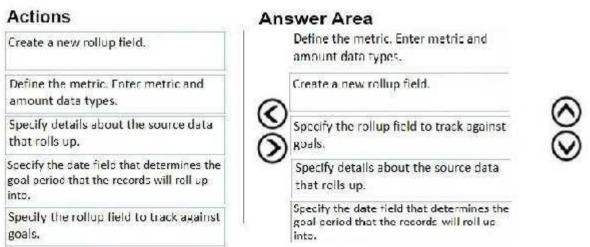You need to create a goal metric with a rollup field.

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

Select and Place:

Actions

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

Answer Area

Correct Answer:

Actions

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

Answer Area

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

Section: Topic 1, Perform Configuration
Explanation

Explanation/Reference:
References: https://docs.microsoft.com/en-us/dynamics365/customer-engagement/sales-enterprise/create-edit-goal-metric
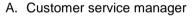
QUESTION 8
A company has the following business units:

▪ 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: Topic 1, Perform Configuration
Explanation

Explanation/Reference:

QUESTION 9
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: Topic 2, Manage cases and the knowledge base
Explanation

Explanation/Reference:

QUESTION 10
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: Topic 2, Manage cases and the knowledge base
Explanation

Explanation/Reference:

QUESTION 11

You manage Dynamics 365 for Customer Service.

You need to configure automatic case creation for emails received by customers who have a support contract.

What should you do?

A. Configure service level agreements to be on hold until a call can be made to the customer.
B. Create an automatic record creation and update rule. Set the source type to email. Configure the rule to send automatic email responses to customers when records are created.
C. Create an automatic record creation and update rule. Set the source type to service activity. Configure the rule to send automatic email responses to customers when records are created.
D. Create an automatic record creation and update rule. Set the source type to email. If a valid entitlement exists, configure the rule to create a case.

Correct Answer: D
Section: Topic 2, Manage cases and the knowledge base
Explanation

Explanation/Reference:

QUESTION 12
A customer service organization plans to implement knowledge management for a custom entity named Root Cause Analysis.

Users must be able to search, link, and rate knowledge articles. Users must be provided with suggested knowledge articles.

You need to configure Dynamics 365 for Customer Service.

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

NOTE: Each correct selection is worth one point.

A. Navigate to the Knowledge Base Management Settings wizard. Then, navigate to Record types and select Root Cause Analysis.
B. Add a lookup to the article entity.
C. In Solution Explorer, expand the Root Cause Analysis entity and select Forms. Edit the main form and configure a knowledge base search control.
D. In Solution Explorer, expand the Root Cause Analysis entity and select Forms. Edit the main form and configure a subgrid for knowledge articles.
E. In Solution Explorer, select the Root Cause Analysis entity and then select Knowledge management.

Correct Answer: ACE

Section: Topic 2, Manage cases and the knowledge base
Explanation

Explanation/Reference:

QUESTION 13
A company implements Dynamics 365 for Customer Service. You are assigned a case.

You accidently close the case before completing your work.

You need to ensure that you can continue to work on the case.

What should you do?

A. Reassign the case
B. Reactivate the case
C. Clone the case
D. Change the status reason to In Progress

Correct Answer: B
Section: Topic 2, Manage cases and the knowledge base
Explanation

Explanation/Reference:

QUESTION 14
A company uses Dynamics 365 for Customer Service. A case in the queue is routed to you.

You will be going on a vacation.

You need to assign the case to someone else.

you do?

A. Release the case.
B. Route the case to another queue.
C. Share the case.
D. Escalate the case

Correct Answer: A
Section: Topic 2, Manage cases and the knowledge base
Explanation

Explanation/Reference:

QUESTION 15
Customer service representatives are not able to manually add service-level agreements (SLAs) to a record.

You need to enable on-demand SLAs.

What should you do?

A. Configure the scope of the workflow
B. Publish the on-demand SLA
C. Activate the SLA
D. Request an administrator to add the SLA field to the entity form

Correct Answer: D

Section: Topic 3, Manage queues, entitlements, and SLAs
Explanation

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

QUESTION 16
HOTSPOT

You are a Dynamics 365 for Customer Service administrator.

Your company is trying to determine whether it needs to use standard or enhanced service-level agreements (SLAs).

You need to configure SLAs based on the requirements.

Which type of SLAs should you use? To answer, select the appropriate option in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

Answer Area

Requirement	SLA options
Configure business hours. SLA applies only during this time.	▼ Only standard SLA Only enhanced SLA Both standard and enhanced SLA
Pause and resume an SLA.	▼ Only standard SLA Only enhanced SLA Both standard and enhanced SLA
Configure KPI warnings and warning action.	▼ Only standard SLA Only enhanced SLA Both standard and enhanced SLA

Correct Answer:

Answer Area

Requirement	SLA options
Configure business hours. SLA applies only during this time.	Only standard SLA / Only enhanced SLA / **Both standard and enhanced SLA**
Pause and resume an SLA.	Only standard SLA / **Only enhanced SLA** / Both standard and enhanced SLA
Configure KPI warnings and warning action.	Only standard SLA / **Only enhanced SLA** / Both standard and enhanced SLA

Section: Topic 3, Manage queues, entitlements, and SLAs
Explanation

Explanation/Reference:

QUESTION 17
You are a Dynamics 365 for Customer Service administrator.

You need to deactivate entitlements.

When should you deactivate entitlements? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

A. A customer's entitlement has ended and no more support is desired.
B. A customer renews an entitlement for 100 more hours or one year.
C. A customer calls and wants to know how many hours of support remain.
D. The customer must change remaining support hours from all email support to one-half email support and one-half phone support.
E. You need to add notes to the customer's entitlement.

Correct Answer: DE
Section: Topic 3, Manage queues, entitlements, and SLAs
Explanation

Explanation/Reference:

QUESTION 18
You are a customer service manager using Dynamics 365 for Customer Service.

You need to restrict support to the products that a customer has purchased.

What should you do?

A. Add the product to the account
B. Add the products to the case
C. Add the products to the customer's entitlement
D. Add the products to the customer

Correct Answer: C
Section: Topic 3, Manage queues, entitlements, and SLAs
Explanation

Explanation/Reference:

QUESTION 19
You manage a Dynamics 365 for Customer Service environment.

The entitlement for a customer ended last month. The customer must renew the entitlement and use the same parameters as the expired entitlement.

You need to create the entitlement for the customer.

What should you do?

A. Create a new template with the dates and terms. Activate the template.
B. Delete the old entitlement. Create a new entitlement template.
C. Add the new end date to the current entitlement and set new terms. Activate the entitlement.
D. Make a copy of the old entitlement. Activate the copy.
E. In the old entitlement, zero out the remaining terms and the total terms. Activate the entitlement.

Correct Answer: C
Section: Topic 3, Manage queues, entitlements, and SLAs
Explanation

Explanation/Reference:

QUESTION 20
You are using Dynamics 365 for Customer Service.

You need to automate the process of adding cases to a queue.

What should you do?

A. Use routing rules
B. Use the convert activities functionality with cases
C. Use the add to queue button on a case
D. Use the Assign button on a case

Correct Answer: A
Section: Topic 3, Manage queues, entitlements, and SLAs
Explanation

Explanation/Reference:

QUESTION 21
You are using Dynamics 365 for Customer Service.

You need to create the entitlements for your customers.

What should you do?

A. Create queues for each channel.
B. Create an entity for each channel and configure the relationship with the entitlement.
C. Configure entitlement channels.
D. Configure routing rules.

Correct Answer: C
Section: Topic 3, Manage queues, entitlements, and SLAs
Explanation

Explanation/Reference:

QUESTION 22
You are a customer service manager for a company using Dynamics 365 for Customer Service.

You need to set up queues to manage support. You assign a team to each queue.

What type of queue should you configure?

A. Personal
B. Private
C. Business unit
D. Public

Correct Answer: B
Section: Topic 3, Manage queues, entitlements, and SLAs
Explanation

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

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.

Your company provides clients with Dynamics 365 for Customer Service Voice of the Customer employee satisfaction surveys. The company has a standardized set of survey questions named Satisfaction Survey.

You need to customize the survey for each client.

Solution: Clone the satisfaction survey and customize the questions.

Does the solution meet the goal?

A. Yes
B. No

Correct Answer: A
Section: Topic 4, Configure Voice of the Customer
Explanation

Explanation/Reference:
References: https://docs.microsoft.com/en-us/dynamics365/customer-engagement/voice-of-customer/design-basic-survey#clone-or-import-an-existing-survey

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.

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: Topic 4, Configure Voice of the Customer
Explanation

Explanation/Reference:

QUESTION 25
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: CD
Section: Topic 4, Configure Voice of the Customer
Explanation

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

QUESTION 26
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: Topic 4, Configure Voice of the Customer
Explanation

Explanation/Reference:
References:
https://docs.microsoft.com/en-us/dynamics365/customer-engagement/voice-of-customer/design-advanced-survey#design-interactive-surveys-by-using-responserouting

QUESTION 27
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: BD
Section: Topic 4, Configure Voice of the Customer
Explanation

Explanation/Reference:
References:
https://docs.microsoft.com/en-us/dynamics365/customer-engagement/voice-of-customer/design-advanced-survey#add-the-unsubscribe-option-to-a-survey.