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Microsoft Dynamics 365 for Customer Service

Microsoft MB-230

Version Demo

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Topic Break Down

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QUESTION NO: 1

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

ANSWER: A

Explanation:

Use **https://contoso.crm.dynamics.com**. This is the organization's environment URL, which identifies the specific Dynamics 365 Customer Service (Dataverse) environment that Power BI must connect to. When configuring the Microsoft Dataverse connector in Power BI, the connection is made by supplying the environment URL; Power BI then authenticates the user and discovers the available Dataverse tables in that environment. For an organization named Contoso in the standard Dynamics 365 online domain, the environment URL follows the `https://<organization>.crm.dynamics.com` pattern, making `https://contoso.crm.dynamics.com` the appropriate value. This URL is also the normal application URL used to access that Dynamics 365 organization in a browser. After the connection is established, authorized users can select Dataverse tables, transform data in Power Query, and build reports and semantic models in Power BI. Microsoft's Dataverse connector documentation describes connecting by entering the environment URL, and Microsoft's environment documentation explains that each Dataverse environment has its own URL. See Microsoft Dataverse connector documentation and Microsoft Power Platform environments overview.

QUESTION NO: 2

You manage a Dynamics 365 for Customer Service environment. You create and activate a routing rule.

You need to modify the routing rule to target a queue instead of a user. You navigate to routing rule sets.

What should you do first?

A. Use Lookup to specify the Add to queue value.

B. Select Edit to the command bar.

C. Toggle the radio button for Route from user/team to queue.

D. Deactivate the routing rule.

ANSWER: D

Explanation:

Deactivate the routing rule. is the required first action because an active routing rule set is in use and cannot be modified until it is deactivated. Deactivation returns the rule set to a state in which its routing rules and rule items can be edited safely. After deactivating it, you can open the relevant rule item, change the routing destination from a user or team to a queue, select the intended queue, and then activate the rule set again for the revised routing logic to take effect.

This lifecycle prevents partially edited routing configuration from affecting incoming cases while the rule set is operational. In Dynamics 365 Customer Service, routing rules are organized in rule sets, and activation publishes the configured rules for use in case routing. Therefore, changing an existing activated rule begins with deactivation rather than directly editing the destination fields. Microsoft's routing-rule guidance describes creating, managing, activating, and deactivating routing rule sets and their rule items. See Create and manage routing rules and Route cases by using routing rules.

QUESTION NO: 3

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.

ANSWER: A B

Explanation:

Enable knowledge analytics. is required because Knowledge Analytics collects and presents data about how users interact with knowledge, including the terms entered during knowledge searches. Enabling this capability makes the search-related analytics available in the Customer Service environment and allows the organization to use the embedded Knowledge Analytics reporting experience.

Select Knowledge search analytics after adding the Additional features. is also required because the Knowledge search analytics dashboard is the specific analytics view that exposes search-term information. This dashboard includes the top search terms, allowing management to identify the words and phrases agents search for most often and use those insights to improve article content, keywords, and knowledge coverage. The dashboard is accessed from the Knowledge area through Additional features after Knowledge Analytics has been enabled and the analytics data is available.

Microsoft documents the setup and availability of Knowledge Analytics in Configure knowledge analytics. For the knowledge-management feature set and its reporting context, see Knowledge management in Dynamics 365 Customer Service.

QUESTION NO: 4

You need to ensure that an appropriate resource for sick appointments can be scheduled.

What should you configure?

A. Services

B. Queues

C. Facilities/equipment

D. Activities

ANSWER: A

Explanation:

Services is correct because a service defines the work that is being scheduled and the resource requirements needed to perform it. In Dynamics 365 Customer Service service scheduling, a service can be associated with one or more resource groups, users, facilities, or equipment. The service definition also specifies a selection rule that determines whether all required resources, any available resource, or a particular combination of resources must be available before an appointment can be scheduled. This lets the scheduling engine identify suitable available resources for the requested appointment rather than treating every resource as interchangeable.

For example, an organization can define a service for a particular type of appointment, associate the staff members and any required room or equipment with that service, and define the duration and resource-selection requirements. When a scheduler creates a service activity for that service, Dynamics 365 uses those requirements and the resources' working hours to locate an appropriate scheduling time. Configure the service whenever the appointment type must drive which resources are eligible to be booked. Microsoft documents the service setup process and its resource requirements in Configure services in Customer Service and explains the resources used by service scheduling in Set up resources for service scheduling.

QUESTION NO: 5

You need to assign the minimum required security roles to a bot for the customer service supervisor. Which security roles should you use?

A. Omnichannel supervisor and customer service manager

B. Omnichannel supervisor and customer service representative

C. Omnichannel agent and customer service representative

D. Omnichannel agent and Omnichannel supervisor

ANSWER: D

Explanation:

Omnichannel agent and Omnichannel supervisor is the minimum required role combination for a bot user that must participate in Omnichannel for Customer Service while supporting supervisor-level scenarios. The Omnichannel agent role provides the foundational permissions required for the bot to be available as an Omnichannel participant and to work with routing-related records and conversations. The Omnichannel supervisor role supplies the permissions needed for supervisor capabilities, including access to the appropriate monitoring and work-item information used in Omnichannel operations. Assigning both roles follows the least-privilege approach because it grants the bot the specific Omnichannel permissions it needs without adding broader Customer Service application roles that are intended for human users performing full customer-service or managerial work. Microsoft's bot configuration guidance identifies the Omnichannel roles that must be assigned to the bot application user, and the Omnichannel security documentation describes the purpose of the built-in agent and supervisor roles. See Configure a bot in Omnichannel for Customer Service and Manage security roles for Omnichannel for Customer Service.

QUESTION NO: 6

A company has a Customer Service deployment. The company plans to implement the following:

• AI suggestions for contacts in Teams.

• Training information about the capabilities of suggestions.

You need to identify the scenarios where the relevant contacts will be provided to users.

Solution: The users that are in the Teams channel.

Does the solution meet the goal?

A. Yes

B. No

ANSWER: B

Explanation:

No is correct. Contact suggestions are contextual suggestions that support collaboration on a Dynamics 365 record, such as a case. When a user starts or works with a record-linked Teams chat, Dynamics 365 can use the record context and related-party information to suggest people who may be appropriate participants in that collaboration. The intended scenario is therefore based on the Dynamics 365 record and its associated Teams chat experience, rather than simply on membership or presence in a Teams channel. Channel participants do not, by that fact alone, establish the record context needed to identify relevant customer contacts. Administrators must configure the Teams integration and enable the applicable collaboration features so users can access Teams chats from supported Dynamics 365 records. Users should also be trained that suggestions help identify potentially relevant contacts for the specific work item; they are not a general list delivered to everyone in a channel. See [Configure Microsoft Teams integration in Customer Service] and [Collaborate using Microsoft Teams in Customer Service].

QUESTION NO: 7

You are employed as an administrator for your company's Dynamics 365 for Customer Service implementation.

Your company has several business process flows for managing contracts.

You want to specify the default process flow.

You configure the order of the business process flows.

Does the action achieve your objective?

A. Yes, it does

B. No, it does not

ANSWER: A

Explanation:

Yes, it does. In Dynamics 365 Customer Service, the configured order of business process flows determines which process flow is presented as the default for a table or record type when more than one eligible business process flow is available. The process flow placed first in the order is the default process flow. Therefore, arranging the contract-management flows in the required order achieves the goal of specifying the default flow.

This ordering is especially relevant when users create or open records that can use multiple active flows. Dynamics 365 uses the highest-ranked flow that is available to the user, subject to the flow being active and the user having access through its assigned security roles. Users can still switch to another available business process flow when business requirements allow it, but the ordered first flow supplies the intended initial experience. Administrators should therefore ensure that the preferred contract process is active, applicable to the relevant table, available to the appropriate users, and positioned at the top of the business process flow order.

For Microsoft guidance on business process flows, see [Business process flows overview] and [Create a business process flow].

QUESTION NO: 8

You are configuring a chat channel in Omnichannel for Customer Service.

The chat widget must display only during the support team's operating hours. Customers who start a chat outside those hours must receive an offline message.

Which two components should you configure? Each correct answer presents part of the solution.

NOTE: Each correct selection is worth one point.

A. Configure operating hours for the workstream.

B. Configure an offline message for the chat widget.

C. Create an entitlement channel for chat.

D. Configure a capacity profile for the chat widget.

E. Add a knowledge base search control to the case form.

ANSWER: A B

Explanation:

Operating hours define when the chat channel is available for customer conversations. Associate the appropriate operating-hours record with the workstream so that Omnichannel can evaluate availability for the channel.

Configure the chat widget's offline message to provide customers with the required communication when no agents are available or when the channel is outside its configured operating hours. The message can direct customers to another service channel or explain when support will resume.

A capacity profile controls agent workload, but it does not define the hours during which a chat widget is available. A knowledge search control is unrelated to chat availability.

For more information, see [Configure a chat widget] and [Set up operating hours].

QUESTION NO: 9

You are configuring a queue in Omnichannel for Customer Service for a call center.

You need to complete the queue configuration using the minimal number of actions.

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 mailbox for the queue

B. Set the record creation and update rules for the queue

C. Set the queue priority for the queue

D. Enable the queue for auto work distribution

ANSWER: C D

Explanation:

For an Omnichannel for Customer Service queue, set the queue priority and enable the queue for auto work distribution. Queue priority determines the relative order in which work is considered when work items can be routed to more than one eligible queue. This lets the call center ensure that work associated with higher-priority queues is handled ahead of work in lower-priority queues while still using the same routing and assignment framework.

Enabling the queue for auto work distribution makes the queue available to the routing service for automated assignment of incoming work to agents. This is the key queue setting that allows Omnichannel work items to be distributed according to the configured routing rules, queue membership or eligibility, and agent capacity. Together, these settings establish the queue's routing priority and allow automated distribution with only the required queue-level configuration actions.

Microsoft documents queue configuration and the automatic work-distribution setting in Create and manage queues for Omnichannel for Customer Service. For the broader routing behavior that uses queue priority and agent capacity, see Unified routing overview.

QUESTION NO: 10

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

ANSWER: B

Explanation:

Reactivate the case is the appropriate action because closing a case changes its state to Resolved, which indicates that work on the customer issue is complete. If the case was resolved accidentally or requires additional investigation, follow-up, or customer communication, reactivating it returns the case to an active state so it can be worked again. After reactivation, the case can be updated, assigned as needed, have activities added, and progress through the organization's configured case-resolution process until it is ready to be resolved again.

In Dynamics 365 Customer Service, users can reopen a resolved case by using the Reactivate action. This preserves the original case record, its history, related activities, customer context, and prior resolution information, which supports continuity of service and accurate case tracking. The availability of this action can depend on the user having the appropriate privileges and on the case not being in a state that prevents reactivation. Microsoft documents the process for reopening resolved cases in Resolve and reactivate cases and describes case lifecycle behavior in the Cases overview.

QUESTION NO: 11

Your company makes use of Dynamics 365 Customer Service with the default settings unchanged.

You want to find like cases in the system using a default search feature.

You make use of Quick Find.

Does the action achieve your objective?

A. Yes, it does

B. No, it does not

ANSWER: A

Explanation:

Yes, it does. Quick Find is a standard Dynamics 365 model-driven app capability for locating records within a specific table, including case records. On the Cases list, a user can enter relevant terms—such as words from a case title, a customer name, or another configured searchable value—to retrieve matching case records. This supports the practical objective of finding cases that are like the case or issue being investigated.

With default settings unchanged, the Case table includes a Quick Find view. A Quick Find view defines which columns are available for searching and which columns are displayed in the results. Consequently, Quick Find provides an immediately available, no-configuration method for users to search the existing case data and identify related or similarly described cases. The precise matches returned depend on the values stored in the case records and the searchable columns configured in the Case Quick Find view, but the feature itself is appropriate for this requirement.

Microsoft describes Quick Find views as the mechanism that controls the columns searched when users use Quick Find, and as a standard view type for tables in model-driven apps. See Create and edit Quick Find views and Create and edit public views in model-driven apps.

QUESTION NO: 12

You are a Dynamics 365 Customer Service administrator.

A service-level agreement (SLA) is applied to cases. Customer service representatives use the Awaiting Customer status reason when they require additional information from a customer.

You need to ensure that SLA timers do not continue while a case has the Awaiting Customer status reason.

What should you configure?

A. Configure Pause settings for the SLA and add the Awaiting Customer status reason.

B. Create an entitlement channel named Awaiting Customer.

C. Set the case priority to Low when the customer must respond.

D. Deactivate the SLA while cases await customer information.

ANSWER: A

Explanation:

Configure **Pause settings** for the SLA and add the Awaiting Customer status reason. Pause settings determine the record states and status reasons during which SLA KPI timers are suspended. When the case is moved to Awaiting Customer, the warning and failure countdowns pause until the case returns to a status reason that is not configured for pausing.

This prevents the service team from being measured against response commitments while progress depends on information from the customer. The SLA remains associated with the case, and its KPI instances resume timing when active work can continue.

For more information, see Define service-level agreements.

QUESTION NO: 13

A company uses Dynamics 365 Customer Service. French is the primary language for all Knowledge articles. Each Knowledge article typically contains more than 10.000 characters. Problem details are described in the article ' s closing text.

You enable AI suggestions for article keywords and descriptions. Users report that the feature does not return effective suggestions.

You need to provide a solution to the users.

What should you do?

A. Ensure the problem details are in the first 2,200 characters of the article.

B. Assign Read privilege for the Keywords Description Suggestion Setting table.

C. Change the Article content data mapping property to Ingested Article URL

D. Create English translations for all Knowledge articles.

ANSWER: A

Explanation:

Ensure the problem details are in the first 2,200 characters of the article. Dynamics 365 Customer Service generates AI-based keyword and description suggestions from a limited initial portion of the knowledge article’s content, rather than analyzing the entire article. When the meaningful problem statement, symptoms, and resolution context are placed only in the closing text of an article that exceeds 10,000 characters, that information falls outside the portion used by the suggestion service. Consequently, the generated keywords and description can be vague, incomplete, or unrelated to the article’s actual purpose.

Authors should structure articles so that the most important diagnostic and issue-specific information appears near the beginning, ideally within the first 2,200 characters. This gives the AI service the relevant context it needs to generate useful metadata that improves article discovery and consistency. French content can be used for the feature; the key remediation in this scenario is moving the relevant details into the supported content window. See Microsoft's guidance for [configuring AI-suggested keywords and descriptions] and the [Dynamics 365 knowledge management overview].

QUESTION NO: 14

Your company uses Dynamics 365 Customer Service. You create the following support offerings. Customers must choose one of the three offerings.

Email only

Phone only

Half phone and half email

You allocate 50 cases to each support offering.

You need to create the entitlement with terms that adhere to the support offerings.

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 one entitlement template that includes the three different terms. Apply the template to the customer, and then remove the terms that do not apply.

B. Create a new entitlement for each new support offering for the customer, with terms equal to 25 phone calls and 25 emails.

C. Create a new entitlement for each support offering for the customer, with channel terms that match the offering: 50 email cases, 50 phone cases, or 25 phone cases and 25 email cases.

D. Create different entitlement templates for each set of terms. Apply the appropriate template to the customer.

E. Create three entitlement templates with terms for 50 calls and 50 emails. Apply the template to the customers as they sign the support offering.

ANSWER: C D

Explanation:

Creating a new entitlement for each support offering, with channel terms that match the offering, is a complete solution because each customer can be assigned an entitlement tailored to the service they purchased. The email-only entitlement can allocate all 50 cases to email, the phone-only entitlement can allocate all 50 cases to phone, and the mixed offering can allocate 25 cases to phone and 25 cases to email. This keeps usage aligned to the customer's contractual channel allowance while maintaining the required total of 50 cases.

Creating different entitlement templates for each set of terms and applying the appropriate template is also a complete solution. Entitlement templates let administrators standardize and quickly create entitlements with preconfigured values such as allocation type, total term, and related support settings. Maintaining separate templates for the email-only, phone-only, and split-channel offerings provides a repeatable process and helps ensure that customers receive the correct entitlement configuration when they sign up. After an entitlement is created, entitlement channels can define the applicable support channels and their allocated terms. See [Create entitlements in Dynamics 365 Customer Service] and [Create entitlement templates].

QUESTION NO: 15

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

An agent identifies two active cases that describe the same customer issue. The agent must retain one case as the primary record and combine the activities and information from the duplicate case.

You need to configure the agent action.

What should the agent do?

A. Merge the cases.

B. Resolve both cases and create a new case.

C. Create a child case from the duplicate case.

D. Assign both cases to the same queue.

ANSWER: A

Explanation:

The agent should **merge the cases**. The Merge command combines a duplicate case into a selected primary case. The primary record remains active and retains the customer-service history while the duplicate record is merged according to the supported case merge process.

Merging is appropriate when two records represent the same issue and the organization needs one case for continued tracking and resolution. Closing the duplicate without merging would not consolidate the associated information, and creating a parent-child relationship is intended for related but separate issues rather than duplicate records.

For more information, see Merge duplicate cases.

QUESTION NO: 16

You are customizing an Omnichannel for Customer Service implementation.

You need to configure the escalation process to a human agent.

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

NOTE: Each correct selection is worth one point.

A. In the Power Virtual Agent topic, add the Transfer to agent node.

B. Add a context variable in Power Virtual Agents to escalate the conversation.

C. Select a context variable in Omnichannel and update the information from Power Virtual Agents.

D. Add a bot user to the Omnichannel queue.

E. Set the operating hours to escalate a conversation.

ANSWER: A B D

Explanation:

To enable a bot conversation to escalate to a human agent, configure the bot topic with the **Transfer to agent** node. This node initiates the handoff from the bot to Omnichannel for Customer Service when the relevant topic path is reached, such as when the customer asks for an agent or the bot cannot complete the request. Create a context variable in Power Virtual Agents so relevant information can be retained and passed as part of the escalation context. Context variables let the receiving agent access useful details gathered during the bot interaction, supporting a smoother continuation of the conversation without asking the customer to repeat information. Finally, add the bot user to the Omnichannel queue. The queue establishes the routing target that allows the transferred conversation to be assigned to an appropriate human agent according to the configured routing and capacity rules. Together, the transfer node, conversation context, and queue membership provide the required bot-to-agent escalation path. Microsoft documents the handoff behavior in Configure handoff to Omnichannel and bot configuration requirements in Configure a bot in Omnichannel for Customer Service.

QUESTION NO: 17

You are a Dynamics 365 for Customer Service administrator.

You have been tasked with making sure that cases are automatically created for emails received by clients in possession of a support contract.

You have created an automatic record creation and update rule.

Which two of the following actions should you take NEXT?

A. You should configure the rule to generate a case if a valid entitlement exists.

B. You should configure the rule to send automatic email responses to customers when records are created.

C. You should set the source type to service activity.

D. You should set the source type to email.

ANSWER: A D

Explanation:

To create cases automatically from incoming customer email only when the sender has support coverage, configure the rule's source type as email and configure case creation to require a valid entitlement. The email source type tells Dynamics 365 Customer Service to evaluate incoming email activities against this automatic record creation and update rule. This is the required channel selection for an email-driven case-creation process.

A valid entitlement represents the customer's available support contract or service level. By requiring a valid entitlement before the rule creates a case, the configuration ensures that email from customers with active support coverage is eligible for automatic case creation. Entitlements can be associated with a customer and used to govern the support to which that customer is entitled, including the cases that consume the entitlement. Together, email as the source and the valid-entitlement requirement directly implement the stated operational requirement without relying on a separate manual verification process.

For configuration details, see Automatically create or update records and Entitlement management in Microsoft Learn.

QUESTION NO: 18 - (HOTSPOT)

A company has satellite offices that service local areas.

Each office must have full control over its own resources.

You need to configure the organizational units to reflect the satellite office structure.

Which entities should you use to relate to the organizational units? To answer, select the appropriate options in the answer area.

ANSWER:

Explanation:

Use **User** for the Person record type and **Service Activity** for the Activity record type. Satellite offices that need independent control of their own work are represented through organizational structures and security boundaries in Dynamics 365. Internal employees who access the application, own or work with records, and perform work for a particular office are represented by User records. Associating the appropriate users with the relevant organizational unit supports assigning responsibility, access, and operational control to the staff in that office. A contact is a party external to the organization, such as a customer, supplier, or other individual whose details are tracked for customer relationship purposes; it is not the internal identity used to establish office-level control of resources.

A Service Activity is the appropriate activity record to relate to this organizational context because it represents service work that is planned and performed using service resources. It can be used to organize the work handled by an office while the users in that office carry out the service activity. This combination lets the organization maintain a clear separation between the internal people responsible for work and the service work itself. Microsoft's documentation on business units and security explains how business-unit structures support organizational security boundaries, while the Service Activity documentation describes service activities for scheduling and managing service work.

QUESTION NO: 19

You need to configure the queue for telephone-based cases.

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 from email.

B. Define an SLA and entitlements and set entitlement values for case numbers.

C. Configure a status reason transition.

D. Create a case routing rule.

E. Automatically create or update records.

ANSWER: D E

Explanation:

Create a case routing rule. is a complete solution because routing rules evaluate cases when they are created and send them to the appropriate queue according to configured conditions. A rule can use case attributes that identify telephone-originated requests, such as the case origin or other values populated by the phone-support process. This provides consistent, automatic queue assignment without requiring an agent to manually select the queue for every case.

Automatically create or update records. is also a complete solution when the telephone integration supplies an incoming activity that can be processed by an automatic record creation and update rule. These rules can create or update a case from an incoming interaction and associate the rule with the relevant queue. Rule conditions and record-mapping settings ensure that the case created for the telephone-support process contains the required information and enters the intended queue for agent handling. This approach is especially useful where the telephony solution generates activities or custom activities that Customer Service can process automatically.

Microsoft documents case routing rules and their queue-assignment behavior in [Set up rules to route cases](). For the automatic creation and update approach, see [Automatically create or update records]().

QUESTION NO: 20

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.

ANSWER: A E

Explanation:

Run the summary report. Export the report to Microsoft Excel. Send the Excel file to the users. is correct because it produces a standalone copy of the survey-summary data. The recipients can open and analyze the attached workbook using Excel or another compatible spreadsheet application without needing to sign in to Dynamics 365. Exporting is an appropriate way to distribute report results outside the application while preserving the ability to sort, filter, and review the resulting data.

Run the survey summary report. Print the report to a PDF file. Send the PDF file to the users. is also correct because PDF is a portable, fixed-layout document format. It allows the report output to be shared as an attachment with people who do not have a Dynamics 365 license, while retaining the report's presentation for straightforward reading, printing, and archival. Both approaches distribute a static file generated by an authorized Dynamics 365 user rather than requiring the recipient to access Dynamics 365 directly. Microsoft documents exporting data for use in Excel and supports using report output in shareable formats. See [Export data to Excel]() and [Run reports in model-driven apps]().

QUESTION NO: 21

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.

ANSWER: A B D

Explanation:

Deactivate an entitlement when a customer's entitlement has ended and no more support is desired. Deactivation prevents the entitlement from being applied to new cases, ensuring that customer service agents do not consume benefits after the agreed support period is over. An entitlement can also be deactivated as part of the renewal process. When a customer renews an entitlement for 100 more hours or one year, the administrator can deactivate the existing record, update the relevant entitlement terms such as the allocation or end date, and then activate it again for continued use. Deactivation is also appropriate when the remaining support hours must be changed from all email support to one-half email support and one-half phone support. Entitlement channel allocations are contractual support terms, so changes to those terms should be made while the entitlement is inactive and then made available again once the revised allocation is complete. Microsoft documents the entitlement lifecycle and the use of entitlements to define and track support terms in Define entitlements in Dynamics 365 Customer Service and Create entitlements in Dynamics 365 Customer Service.

QUESTION NO: 22

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.

ANSWER: B D

Explanation:

Set the Allow unsubscribe setting to Yes. This survey-level setting enables the unsubscribe capability for recipients of that survey, allowing VoC to recognize and honor a recipient's request not to receive future survey communications. It is a deliberate configuration choice in the survey's advanced settings and should be enabled when survey invitations are sent by email to external recipients.

Configure the survey to display when Dynamics 365 customers receive email and enable the Unsubscribe option. The email invitation experience must expose the unsubscribe action to the recipient. When the survey invitation is configured to include that option, recipients can select it directly from the communication rather than needing to contact the organization separately. Together, the survey setting and the invitation configuration provide both the authorization for unsubscribing and the recipient-facing mechanism used to submit the request.

This configuration supports responsible email-survey delivery by making opt-out available in the communication channel through which recipients receive survey requests. For the legacy VoC survey configuration guidance, see Microsoft documentation on adding an unsubscribe option. Related current Microsoft guidance for survey-email opt-outs is available at Manage the unsubscribe list in Dynamics 365 Customer Voice.

QUESTION NO: 23

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.

ANSWER: D E

Explanation:

Dynamics 365 Customer Service supports applying an SLA on demand in two supported ways: through automation based on defined business logic and through a user's manual selection on an individual record. **Automatically apply SLAs to records based on business logic.** is appropriate when an organization needs repeatable assignment based on attributes such as customer type, case priority, entitlement, product, or another business condition. Automation can set the SLA lookup for applicable records, ensuring that the selected SLA is applied consistently when the business conditions are met.

Assign SLAs manually to records. is appropriate when a service representative or administrator must make a case-by-case decision. An authorized user can select the applicable SLA in the SLA field on a supported record, such as a case, even when the related customer does not already have a default customer SLA. After the SLA is applied, the relevant SLA KPI instances and timers can be created and tracked according to that agreement's configuration. This flexibility allows the service desk to handle exceptional or one-off service commitments without changing the customer's standing SLA configuration. Microsoft documents both manual and automated approaches for applying SLAs on demand. See Apply SLAs on demand and Define service level agreements.

QUESTION NO: 24 - (DRAG DROP)

DRAG DROP

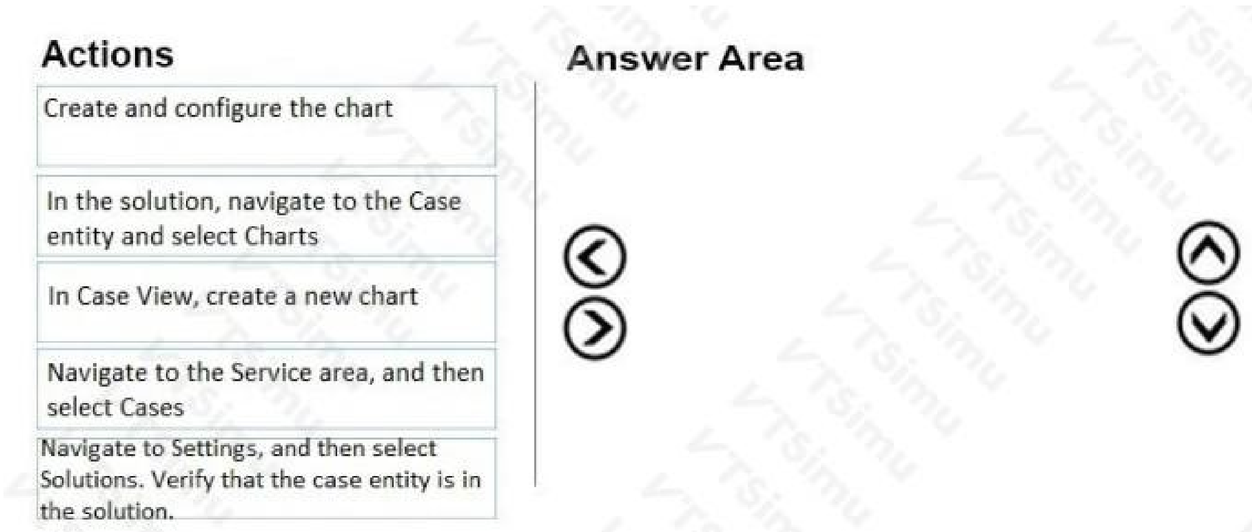
You are customizing a Dynamics 365 for Customer Service implementation.

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.

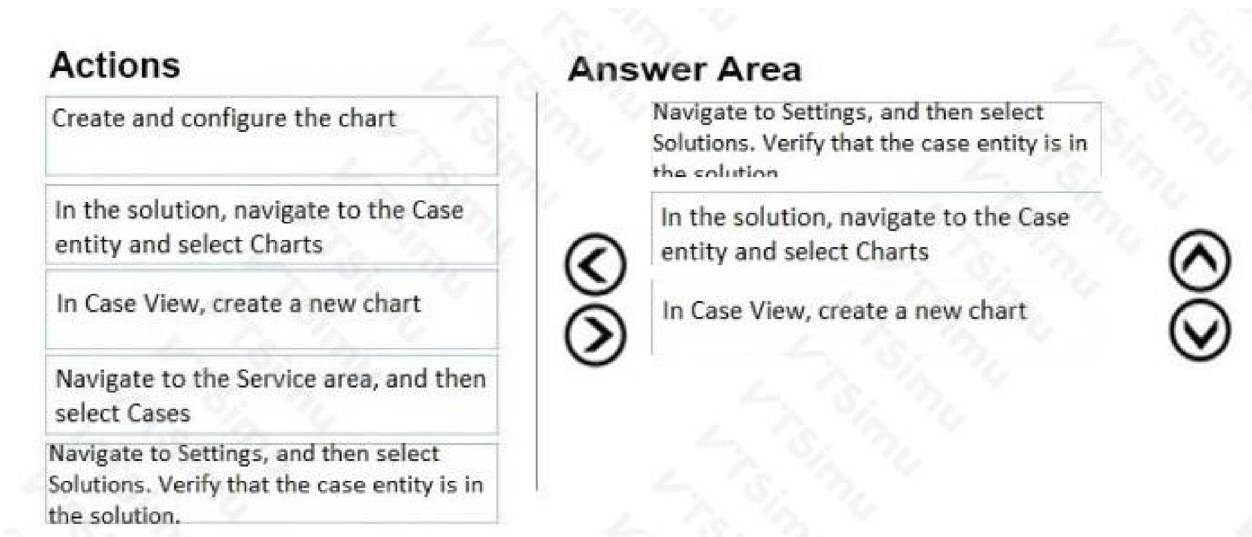
You need to create the chart.

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:



ANSWER:



Explanation:

A chart that must be visible to everyone working in the service area should be created as a system chart and included in a solution. The process starts by going to **Settings**, opening **Solutions**, and confirming that the **Case** table is part of the selected solution. Solutions are the appropriate customization container because they package table components, including charts, and support moving the completed customization between environments.

After the Case table is available in the solution, open that table and select **Charts**. This is the design area for charts associated with Case records. Starting from the table's Charts component ensures that the chart is created as part of the Case customization rather than as an individual user's personal visualization. A system chart can then be exposed in the model-driven service application for users who need to review case performance.

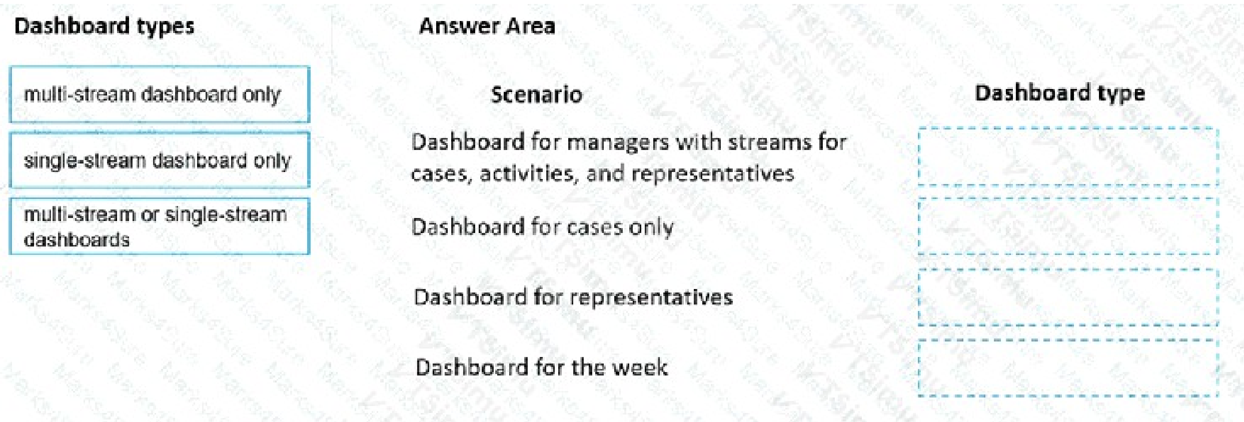
The final step is to create and configure the chart. Configure it to use resolved cases, group the data by month, and separate or group the results by call center agent as required by the reporting design. Once saved and published with the solution, the chart becomes a reusable shared visualization for the service team. Microsoft's guidance on creating and editing system charts is available in [Create and edit system charts](). Details on using solutions to manage customizations are available in [Solution concepts]().

QUESTION NO: 25 - (SIMULATION)

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.



ANSWER: See the explanation for the answer

Explanation:

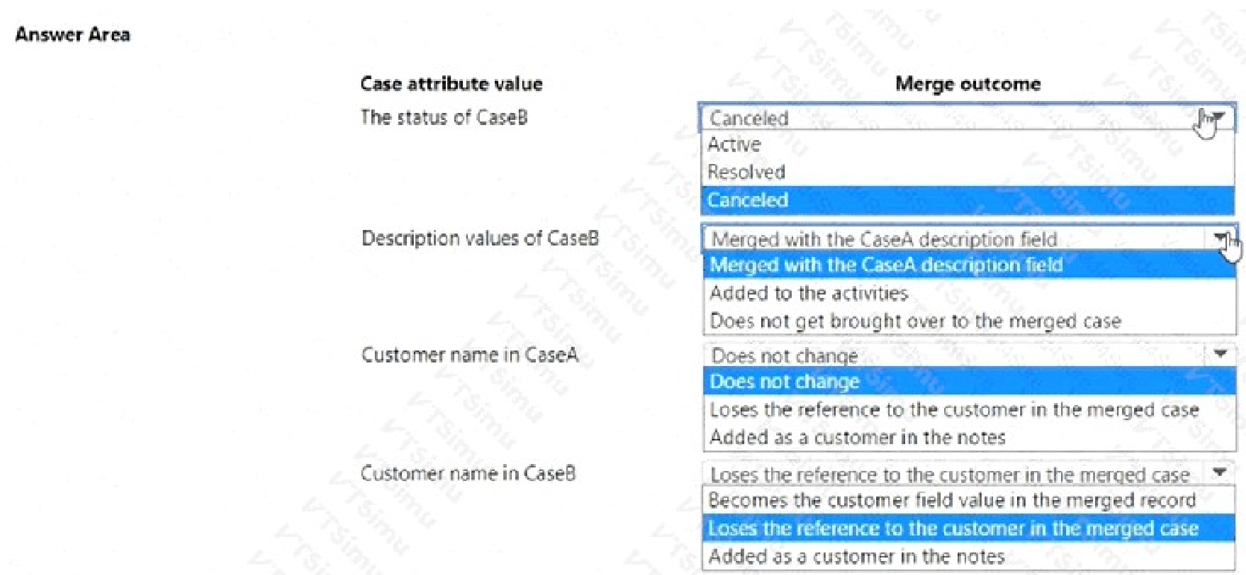
Dashboard type selections:

A multi-stream dashboard is required when the dashboard must simultaneously provide separate streams for multiple areas, such as cases, activities, and representatives. A cases-only requirement calls for one stream. A dashboard audience (representatives) or a time period (the week) does not itself require a particular number of streams, so either dashboard layout can be used.

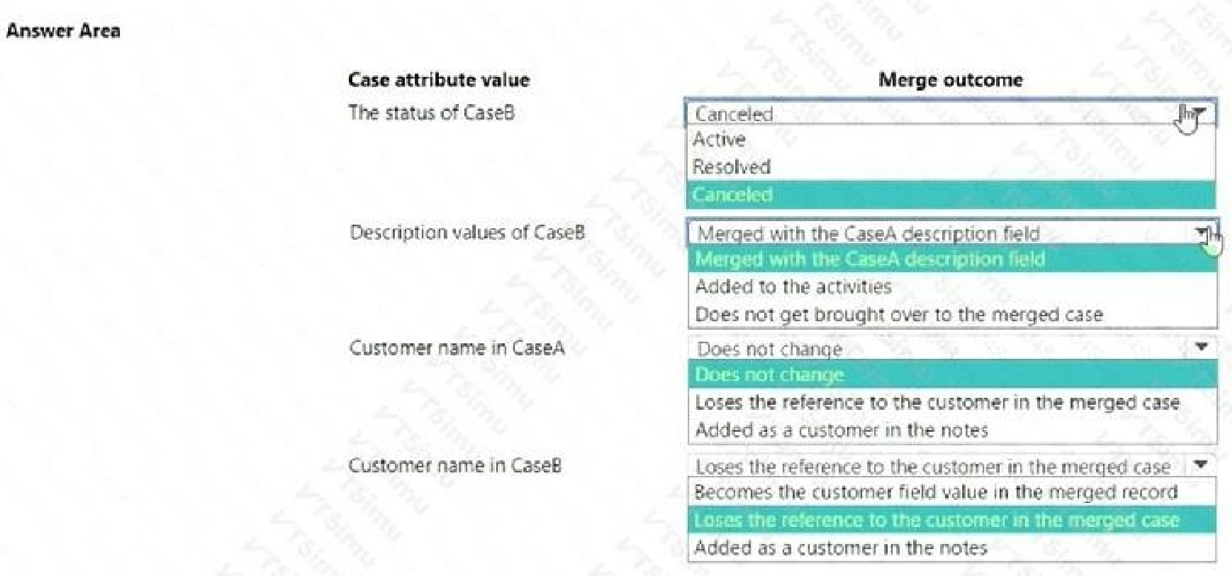
QUESTION NO: 26 - (HOTSPOT)

You are the Dynamics 365 administrator for a help desk. You merge CaseB into CaseA. 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.



ANSWER:



Explanation:

When one case is merged into another in Dynamics 365 Customer Service, the selected destination case, CaseA in this scenario, is the master case. It remains the working case and preserves its own key values, including its existing Customer value. Therefore, the customer name on CaseA does not change as a result of merging CaseB into it.

CaseB is the subordinate case. The merge process closes that duplicate or consolidated record by setting its status to **Canceled**. This makes the case history clear while ensuring agents continue to work from the master case rather than treating both cases as open records.

The description from the subordinate case is retained as part of the master case information. Specifically, the description values from CaseB are merged with the CaseA description field. This preserves details that may have been captured on the duplicate case and keeps the consolidated context available to agents working on CaseA.

The customer reference from CaseB is not used to overwrite or supplement the master case customer. Since CaseA remains the authoritative case record, its Customer field stays as it was, and the customer name from CaseB loses its reference in the merged case. This behavior supports a single, consistent customer association for the surviving case. Microsoft describes case merging and the handling of a subordinate case in its Merge cases documentation. General case-management behavior is also covered in the Dynamics 365 Customer Service case management documentation.

QUESTION NO: 27

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

You accidentally 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

ANSWER: B

Explanation:

Reactivate the case is correct because a case that has been resolved or closed is no longer active for normal case-management work. Reactivating it returns the case to an active state, allowing the assigned customer service representative to continue investigation, update case details, create and manage related activities, communicate with the customer, and ultimately resolve the case when the work is actually complete.

In Dynamics 365 Customer Service, case resolution records the outcome and closes the case. If that closure occurred prematurely, the supported process is to use the Reactivate command. This preserves the same case record, including its history, customer context, timeline, ownership, and related records, rather than requiring the work to be recreated elsewhere. After reactivation, the case can again be worked through the organization's configured active case status process and resolved at the appropriate time.

Microsoft documents that users can reactivate a resolved case when additional work is needed. See Reactivate and resolve cases in Customer Service and Manage cases in Customer Service.

QUESTION NO: 28

A 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

ANSWER: A B D

Explanation:

Assign the **Dynamics 365 System Administrator** role, the **Power Platform Admin role**, and the **Dynamics 365 Global Administrator** role to provide the administrative scope needed to provision and configure Omnichannel for Customer Service. The System Administrator role supplies full administrative privileges within the Dynamics 365 environment, including the ability to configure Dataverse-based Customer Service components. The Power Platform administrator role grants tenant-level administrative capabilities for Power Platform environments and services, which are required when managing or provisioning features that span the platform. Global administrator permissions provide the Microsoft Entra tenant-level authority required for consent and organization-wide service configuration during setup. Together, these roles cover the environment, Power Platform, and tenant administration boundaries involved in Omnichannel provisioning. Microsoft documents the administrative prerequisites for enabling Omnichannel and the responsibilities associated with Power Platform administrator roles in Enable Omnichannel for Customer Service and Use service admin roles to manage your tenant.

QUESTION NO: 29

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. configure a knowledge base search control.

D. configure a subgrid for knowledge articles.

E. In Solution Explorer, select the Root Cause Analysis entity and then select Knowledge management.

ANSWER: A C E

Explanation:

Knowledge management must first be enabled for the custom Root Cause Analysis entity. In Solution Explorer, selecting the Root Cause Analysis entity and then selecting Knowledge management makes the entity eligible to use knowledge features and establishes the entity-level configuration needed for agents to work with articles in that record context. The entity must also be included through the Knowledge Base Management Settings wizard by navigating to Record types and selecting Root Cause Analysis. This record-type configuration allows Customer Service to use the entity's record data when identifying and presenting relevant knowledge content, including article suggestions. Finally, configuring a knowledge base search control on the Root Cause Analysis form provides the agent-facing experience: users can search the knowledge base from the record, associate relevant articles with the record, and access article feedback capabilities such as ratings. Together, enabling knowledge management, registering the record type, and placing the search control on the form meet the requirements for article search, linking, rating, and suggestions. See Enable knowledge management for custom entities and Search for knowledge articles.

QUESTION NO: 30

You need to ensure that claim disputes conform to the defined case life cycle.

What should you configure?

A. Related cases

B. Case Relationships

C. Timeline

D. Status Reason Transition

E. Subject

ANSWER: D

Explanation:

Status Reason Transition is the appropriate configuration for enforcing a defined case life cycle for claim disputes. In Dynamics 365 Customer Service, a case has a state, such as Active or Resolved, and a status reason that provides the more detailed stage within that state. Status reason transitions let an administrator define exactly which status reasons users can move to from each current status reason. This prevents users from skipping required stages or moving a dispute directly to an inappropriate point in its process.

For example, a claim dispute workflow can require movement from a newly submitted dispute to an investigation stage, then to a decision stage, and finally to resolution. By configuring allowed transitions, the organization can preserve the intended sequence while still supporting the operational states needed by agents. The setting is configured for the Case table and is intended specifically to control the permitted progression between status reasons. Microsoft documents status reason transitions as a way to define valid status-reason changes for rows in a table: Define status reason transitions. Case status and status reason behavior is also described in the Customer Service case documentation: Manage cases in Customer Service.

QUESTION NO: 31 - (DRAG DROP)

DRAG DROP

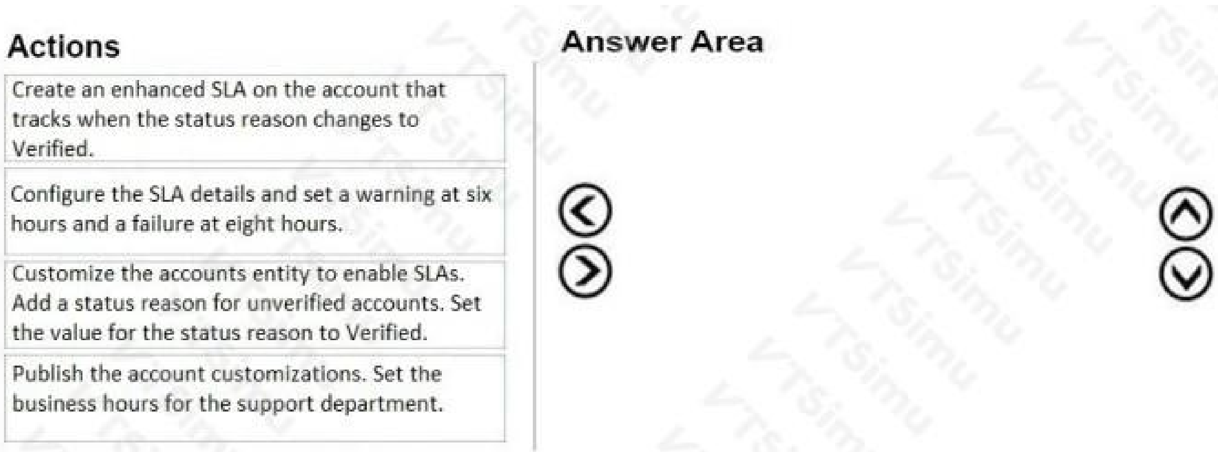
You are a Dynamics 365 for Customer Service administrator. Your company provides support between 9 a.m. and 5 p.m.

You must add a warning to account records when service representatives do not contact an account within eight business hours of the account being verified.

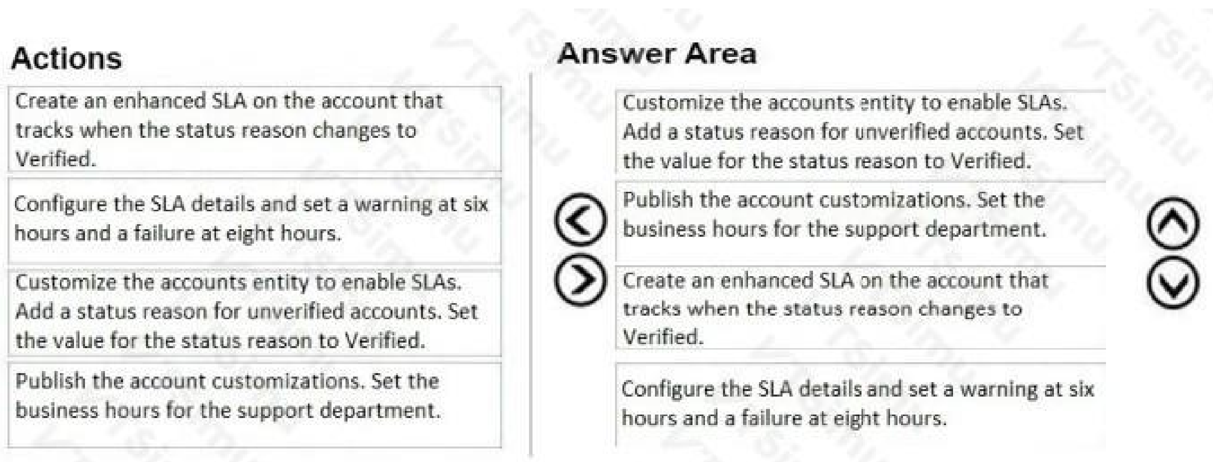
You need to enable service-level agreements (SLAs) for accounts.

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

Select and Place:



ANSWER:



Explanation:

To implement this requirement, first prepare the Account table for SLA use and create the status-reason values needed to identify the lifecycle transition. Enabling SLAs on the table makes the Account record available for enhanced SLA scenarios, while the status reason provides the business event the SLA will monitor: the account becoming Verified. Those table changes must then be published so the SLA designer can use the updated Account metadata and the Verified status-reason value.

Next, configure the support department's business hours. The requirement is based on business hours, not elapsed calendar time, so the SLA must have a calendar that represents the 9 a.m. through 5 p.m. support window. That calendar is what allows the warning at six business hours and the failure at eight business hours to pause outside support time and resume during defined working time. Microsoft documents business-hour calendars as part of the service-management configuration used by SLA calculations.

After the prerequisite table configuration is published and the work schedule is available, create the enhanced SLA for Accounts and define its applicability so it starts when the status reason changes to Verified. Finally, add and configure the SLA detail. The detail contains the warning threshold of six business hours and the failure threshold of eight business hours, using the configured business-hours calendar. This produces the required warning when a representative has not contacted the verified account within the specified working-time window. See Microsoft's guidance for defining service-level agreements and setting customer service schedules and business hours.

QUESTION NO: 32

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

ANSWER: C

Explanation:

Customer account must be set for each bulb so the Connected Customer Service process can identify the customer to which the device and resulting service activity belong. A work order needs customer context, including the service account that receives the service or replacement. When a bulb's IoT telemetry indicates a failure, the Power Automate integration uses the configured device and customer relationship to create a work order with the appropriate customer information. This makes the work order actionable for fulfillment, shipping, scheduling, and service-history purposes.

In a Connected Customer Service implementation, organizations model IoT-enabled equipment as customer assets and associate those assets with the relevant customer account. The IoT device data and alert-processing automation can then resolve the customer record when it creates downstream service records. Ensuring every deployed bulb is associated with its customer account is therefore essential before automated work-order generation can succeed. Microsoft's Connected Customer Service documentation describes using IoT data to initiate service processes, while the Field Service documentation explains the role of customer assets and their customer associations in service delivery. See Connected Customer Service overview and Customer assets in Dynamics 365 Field Service.

QUESTION NO: 33

You ate a customer service representative for a company that uses Dynamics 365 Customer Service.

When customer service representatives find records that meet specific criteria, they must be able to do the following:

• Open the records in a new tab.

• Open a single record in a new session.

• Open a single record in an existing session on a new tab.

You need to meet the requirements.

Which two actions should you perform? Each correct answer part of a complete solution. NOTE: Each correct selection is worth one point.

A. Use the Customer Service Hub.

B. Use a Customer Service workspace.

C. Use Open Record Set.

D. Use session templates and application tab templates.

E. Use Global search.

ANSWER: B C

Explanation:

Use a Customer Service workspace. Customer Service workspace is the Dynamics 365 Customer Service app designed for agent productivity through a multisession, multitabs experience. It lets an agent maintain separate work contexts as sessions and open related or independently selected records as application tabs within an active session. This directly supports handling a selected record in either a new session or an existing session without requiring the agent to leave the workspace.

Use Open Record Set. This workspace capability is intended for records returned by a view or other filtered result set. It enables agents to open the resulting set in an application tab, preserving the list context so they can work through records that meet the chosen criteria. Together with the workspace session model, agents can use the record-set tab for the group of matching records and open an individual record in the appropriate new or existing session context.

Microsoft describes Customer Service workspace as a multisession application that supports agent work through sessions and application tabs. See the Customer Service workspace documentation and the Dynamics 365 Customer Service overview.

QUESTION NO: 34

You need to configure the chatbot.

Which two actions should you perform? Each correct answer presents part of the solution. NOTE: Each correct selection is worth one point.

A. Enable a Microsoft Copilot Studio chatbot to end conversations.

B. Add the chatbot to an existing human agent queue.

C. Enable AI suggestions with the chatbot.

D. Create a chatbot queue and a human agent queue.

E. Configure context variables for the chatbot.

ANSWER: D E

Explanation:

Create a chatbot queue and a human agent queue. supports a structured bot-to-agent engagement flow in Dynamics 365 Customer Service. A dedicated queue for bot interactions lets the organization route incoming conversations to the bot as the initial handling resource. A separate queue for human agents provides the destination for escalated conversations that require live assistance. This queue design works with unified routing and workstream configuration to ensure that work is assigned to the appropriate participant at each stage of the customer journey.

Configure context variables for the chatbot. preserves relevant information as the conversation moves through the routing process. Context variables can carry customer, session, and conversation details that routing rules or the bot require. They also allow important information collected during the automated interaction to be available when the conversation is transferred, helping maintain continuity rather than requiring the customer to repeat information. Microsoft documents the use of context variables in Omnichannel conversation and routing scenarios, and describes configuring bots and their handoff behavior as part of Customer Service administration. See [Configure a bot in Customer Service] and [Manage context variables in Customer Service].

QUESTION NO: 35

You have been tasked with forwarding surveys to clients that opened cases in the last 30 days.

You want to make sure that clients without a Dynamics 365 license still receives a summary of the survey results.

Which two of the following are file formats that the summary can be sent in?

A. .xlsx

B. .exe

C. .pdf

D. .txt

ANSWER: A C

Explanation:

The supported formats are **.xlsx** and **.pdf**. Dynamics 365 Customer Voice can distribute a survey response report by email, allowing people who do not have a Dynamics 365 license to receive the report as an attachment. This is appropriate when case-related survey results need to be shared with external clients or other recipients who do not need direct access to the Customer Voice or Dynamics 365 application.

When creating the response-report email, the report can be attached in an Excel workbook format, using the **.xlsx** extension, or as a portable document, using the **.pdf** extension. The Excel workbook is useful when recipients need to sort, filter, analyze, or reuse the response data. The PDF format is useful when recipients need a fixed, presentation-ready summary that preserves the report layout for straightforward review or sharing. Both formats enable survey-result distribution without granting recipients a Dynamics 365 license or interactive product access.

Microsoft documents the report-sharing capability and its supported attachment formats in [Share survey results]. For broader guidance on working with and exporting Customer Voice response data, see [Export survey responses].

QUESTION NO: 36

Your company makes use of Dynamics 365 for Customer Service.

You need to assign a case in the queue that is currently routed to you to a different user because you have booked time off work.

You delete the case.

Does the action achieve your objective?

A. Yes, it does

B. No, it does not

ANSWER: B

Explanation:

No, it does not is correct. Deleting a case is not an assignment action and therefore does not transfer responsibility for the case to another user. A case is a customer-service record that contains the issue, related activities, communications, and resolution history. Removing it would prevent the intended colleague from simply continuing work on the same case and risks losing information that must be retained for customer service, auditing, and reporting.

To hand work over before time off, the case should remain active and be assigned to the appropriate user or team. Assignment changes the case owner while preserving the case record and its history. If the organization uses queues, queue membership and queue items can be used to organize and route work, but the required handoff still involves making the case available to, or assigning it to, the intended user according to the organization's queue and routing process. Microsoft describes queues as containers for records requiring attention and provides case-management capabilities for maintaining and assigning customer issues. See Microsoft Learn: Create and manage queues and Microsoft Learn: Manage cases in Customer Service.

QUESTION NO: 37 - (SIMULATION)

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:

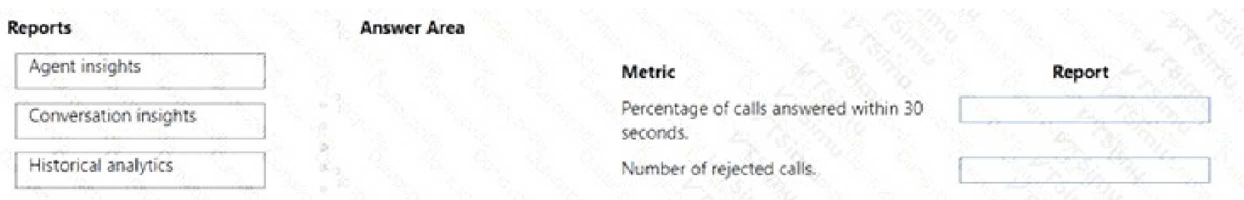
• Percentage of calls that are answered within 30 seconds in the previous four hours.

• 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.



ANSWER: See the explanation for the answer

Explanation:

Configure the reports as follows:

Historical analytics includes the voice service-level measure, such as the percentage of calls answered within the configured answer threshold (30 seconds), and can be filtered to the last four hours. Agent insights provides representative/agent performance measures, including calls rejected per representative, for the selected time period.

QUESTION NO: 38

You are configuring Dynamics 365 Customer Service.

Customer service representatives must use a predefined sequence of actions to resolve cases. The process must display stages such as Identify, Research, and Resolve on the case form.

You need to configure the process.

What should you create?

A. A business process flow for the Case table

B. An SLA for the Case table

C. A business rule for the Case table

D. An entitlement template

ANSWER: A

Explanation:

Create a **business process flow** for the Case table. A business process flow provides a visual sequence of stages and steps that guides users through an organization-defined process. When it is applied to cases, representatives can see the current stage, complete required steps, and move the case through the configured resolution process.

This is different from an SLA, which measures response and resolution commitments, or a business rule, which applies conditional form logic. The required visible, stage-based guidance is provided by a business process flow.

For more information, see Business process flows overview.