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Microsoft Dynamics 365 Fundamentals Customer Engagement Apps (CRM)

Microsoft MB-910

Version Demo

Total Demo Questions: 21

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Topic Break Down

Topic	No. of Questions
Topic 1, Describe Dynamics 365 Customer Engagement apps	7
Topic 2, Describe Dynamics 365 Sales	72
Topic 3, Describe Dynamics 365 Customer Service	56
Topic 4, Describe Dynamics 365 Field Service	40
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QUESTION NO: 1

A company uses Dynamics 365 Customer Service.

The company wants agents to communicate with customers through digital messaging channels from a single workspace.

Which two channels are supported by Dynamics 365 Customer Service digital messaging? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

A. Facebook Messenger

B. Microsoft Teams

C. Microsoft Word

D. Power BI

ANSWER: A B

Explanation:

Facebook Messenger and **Microsoft Teams** are supported digital messaging channels for Dynamics 365 Customer Service. After the channels are configured, incoming conversations can be routed to agents, who can respond from the Customer Service workspace or Omnichannel for Customer Service.

Digital messaging lets service organizations manage asynchronous conversations while retaining customer and conversation context. This enables agents to handle messaging interactions alongside other customer-service work. Microsoft documents available channels in Configure channels in Customer Service.

QUESTION NO: 2

A company uses Dynamics 365 Sales.

The company plans to use LinkedIn Sales Navigator to increase sales productivity and assist salespersons in their daily duties.

You need to identify potential decision makers for a sale.

Which LinkedIn Sales Navigator feature should you use?

A. Related Leads

B. Top Card

C. Auto Capture

ANSWER: A

Explanation:

Related Leads is the appropriate LinkedIn Sales Navigator feature for identifying potential decision makers. When salespeople are working with a lead or contact in Dynamics 365 Sales, the Related Leads control uses LinkedIn Sales Navigator information to surface other people associated with the same organization. This helps a salesperson expand their view beyond the individual already recorded in Dynamics 365 and discover relevant stakeholders who may influence, approve, or participate in the purchasing decision.

Finding these related professionals is particularly useful for account-based selling, where a successful opportunity often requires engagement with several roles rather than a single contact. Salespeople can use the suggested people to build out the buying committee, research job titles and organizational relationships, and decide whom to engage as the opportunity progresses. The feature therefore directly supports the requirement to identify additional potential decision makers while working in the Sales app. Microsoft describes the LinkedIn Sales Navigator integration and its available controls in its

LinkedIn Sales Navigator configuration documentation. Additional integration context is available in the Dynamics 365 Sales LinkedIn integration overview.

QUESTION NO: 3

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. Data loss prevention policy

B. Role-based security

C. Environment-level security

D. Row-level security

ANSWER: B

Explanation:

Role-based security is correct because Dynamics 365 Sales and Dynamics 365 Customer Service use Microsoft Dataverse security roles to control what users can do with data. A security role contains privileges for individual tables, including the permissions to create, read, write, delete, append, append to, assign, and share records. Privileges can also be scoped to a user's own records, their business unit, a parent-and-child business-unit hierarchy, or the whole organization. This enables an administrator to assign technicians a role that permits the tables and actions needed for repair work while withholding Read privileges for the Order and Invoice tables. As a result, technicians can use the required Dynamics 365 functionality but cannot view customer order or invoice records. Security roles are assigned to users or teams, supporting consistent access management as technicians join, change responsibilities, or leave the organization. Microsoft describes security roles as the primary mechanism for defining user access to Dataverse tables and records. See Security concepts in Microsoft Dataverse and Assign security roles to users.

QUESTION NO: 4 - (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.

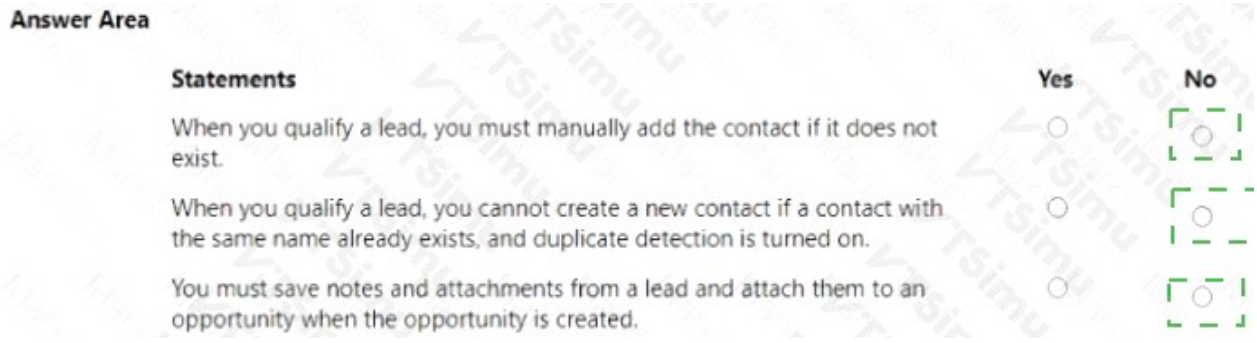
Answer Area

Statements	Yes	No
When you qualify a lead, you must manually add the contact if it does not exist.	○	○
When you qualify a lead, you cannot create a new contact if a contact with the same name already exists, and duplicate detection is turned on.	○	○
You must save notes and attachments from a lead and attach them to an opportunity when the opportunity is created.	○	○

ANSWER:

Answer:

Answer Area



Answer:

Explanation:

All three statements are correctly marked **No**. Lead qualification in Dynamics 365 Sales is designed to convert a qualified lead into the appropriate customer-engagement records without requiring a user to manually create every related record. When the lead contains contact details and a new contact is needed, the qualification process can create the contact as part of qualifying the lead. This supports a consistent conversion process from prospect information to customer records.

Duplicate detection is intended to identify records that might already represent the same person or organization. It helps users make an informed decision and avoid unnecessary duplication, but its presence does not mean that the system can never create a new contact during lead qualification. The process can continue when a new record is appropriate.

Dynamics 365 also retains the business context collected while the lead was being worked. Notes and attachments are included in the lead-qualification transition so that the opportunity team can access the information needed to pursue the newly created opportunity. Users do not need to separately save the lead notes and attachments and then manually attach them to the opportunity. This preserves the history and supporting documents gathered during lead nurturing. Microsoft describes the lead qualification process in its Qualify a lead documentation and provides related configuration guidance in the lead qualification experience documentation.

QUESTION NO: 5

A company uses Dynamics 365 Field Service.

The maintenance manager wants to be able to add a list of question to work orders to ensure that field technicians follow the same steps when servicing customer equipment.

You need to explain to the manager which features are available to meet the requirement. Which feature should you use?

A. Connected Field Service

B. Inspections

C. Microsoft Customer Voice

D. Scheduling

ANSWER: B

Explanation:

Inspections is the appropriate Dynamics 365 Field Service feature because it enables an organization to create reusable inspection templates containing questions and required responses. An inspection can be attached to a work order so that the field technician completes a consistent, structured checklist while performing service. Questions support several response types, such as text, numbers, dates, yes/no answers, multiple-choice selections, and photos, allowing the maintenance manager to capture the information needed for each equipment-service process.

Inspection templates can be designed around the organization's standard maintenance procedures and associated with work order types or service tasks. This helps ensure that technicians receive the same guided steps for similar jobs, while their completed responses are stored with the work order for operational visibility, quality control, and service-history records. The inspection experience is also available to technicians using the Field Service mobile application, supporting completion at the customer site even when the work is performed in the field.

For implementation details, see Create inspections in Dynamics 365 Field Service and Inspections overview.

QUESTION NO: 6

A company sells and services clothing washing machines and dryers. The company uses Dynamics 365 Field Service.

You need to proactively monitor customer's equipment to identify problems and maintenance needs.

Which two Connected Field Service options can you use?

Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

A. Dynamics 365 Remote Assist integration

B. Dynamics 365 mobile app

C. Azure IoT Central

D. Azure IoT Hub

ANSWER: C D

Explanation:

Azure IoT Central and Azure IoT Hub are supported Connected Field Service approaches for connecting customer equipment to Dynamics 365 Field Service. Connected Field Service uses telemetry from Internet of Things devices, such as washing machines and dryers, to identify conditions that can indicate a fault, degradation, or a forthcoming maintenance requirement. This supports a proactive service model: rather than waiting for a customer to report a problem, the organization can monitor device signals and initiate the appropriate service process.

Azure IoT Hub provides the Azure platform service for securely connecting and managing devices and ingesting telemetry at scale. It can act as the IoT connection layer that supplies device data for Field Service scenarios. Azure IoT Central is a software-as-a-service IoT application platform that can simplify creation and management of a connected-device solution, including device monitoring and rules. Either platform can provide the equipment telemetry needed to trigger or support Field Service actions, such as generating an IoT alert and creating a work order for a technician before the equipment fails.

For Microsoft guidance on these capabilities, see Connected Field Service overview and What is Azure IoT Central?.

QUESTION NO: 7

You need to identify the data sources that Microsoft Copilot for Sales can use. Which two sources should you identify? Each correct answer presents part of the solution. NOTE: Each correct selection is worth one point.

A. Microsoft Fabric

B. ERP

C. Microsoft Office

D. CRM

ANSWER: C D

Explanation:

Microsoft Office and **CRM** are the applicable sources. Microsoft Copilot for Sales, now part of the Sales agent experience in Microsoft 365 Copilot, brings customer and sales context into the productivity tools sellers use for email, meetings, and collaboration. It can use Microsoft 365 information available through experiences such as Outlook and Teams to help sellers summarize customer communications, prepare for meetings, and capture relevant sales interactions. It also connects to a

supported CRM system, including Dynamics 365 Sales or Salesforce, to retrieve and present customer, contact, opportunity, and sales-record context. Combining Microsoft 365 work context with CRM business data enables Copilot for Sales to provide seller-focused insights and assistance in the flow of work. Microsoft describes Copilot for Sales as connecting CRM data with Microsoft 365 applications, and its documentation identifies supported CRM connections and the Outlook and Teams experiences through which sellers access these capabilities. For more information, see Microsoft Copilot for Sales overview and Connect Copilot for Sales to a CRM environment.

QUESTION NO: 8

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. Power Automate to transfer cases

B. Service level agreements

C. Knowledge base management

D. Customer Service Insights

ANSWER: C

Explanation:

Knowledge base management is the appropriate solution because it enables support teams to capture, maintain, find, and reuse approved troubleshooting guidance and answers as knowledge articles. Instead of relying on individual agent experience or repeatedly reproducing customer issues, agents can search the knowledge base from within the Customer Service workspace while working on a case. They can then use consistent, organization-approved information to guide the resolution and, when appropriate, share relevant articles with customers.

A well-managed knowledge base improves both agent efficiency and the quality and consistency of customer support. Subject-matter experts can author articles that document symptoms, causes, resolution steps, and useful supporting information. Review and publishing processes help ensure that the guidance made available to agents is accurate and current. Feedback and usage information can also help the organization identify articles that need improvement or topics for which additional documentation is needed. This directly addresses the need to reduce resolution times, avoid repeated investigation, and make answers reusable across the support desk. For more information, see Knowledge management in Dynamics 365 Customer Service and Create and manage knowledge articles.

QUESTION NO: 9 - (DRAG DROP)

DRAG DROP

A company uses Dynamics 365 Sales. The following groups of users must be able to perform specific activities with account data.

User group	Has Dynamics 365 Sales license	Requirement
Group A	No	View account data.
Group B	Yes	Make bulk changes to account data without downloading data to a local computer.

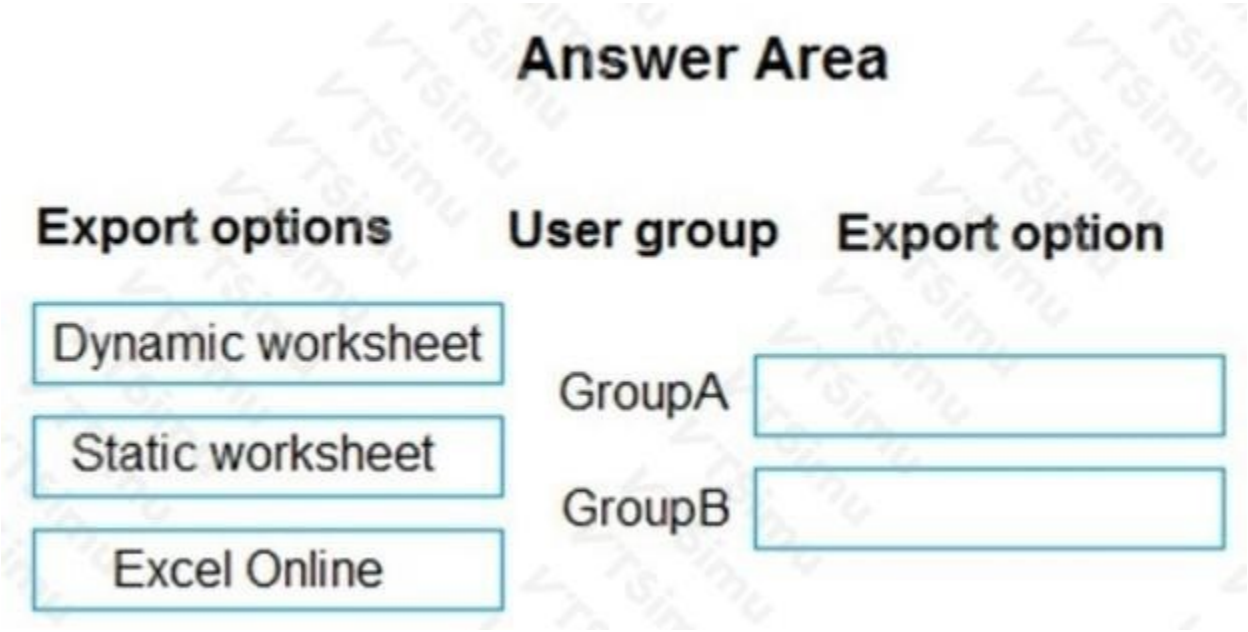
You need to export data for each group of users.

Which export options should you recommend?

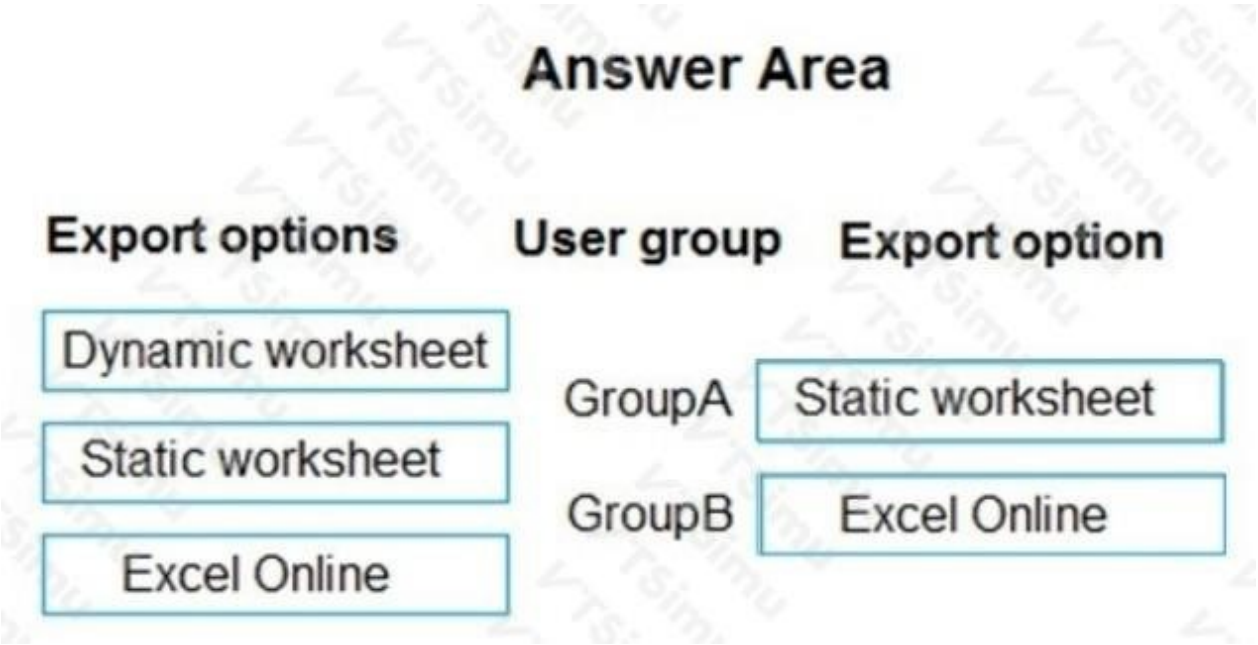
To answer, drag the appropriate export options to the correct user groups. Each export option may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

Select and Place:



ANSWER:



Explanation:

GroupA should use **Static worksheet**. A static export creates an Excel workbook containing the account records as they exist at the time the export is performed. This is appropriate when the group needs a fixed, standalone copy of account data for distribution, reporting, archival, or offline review. The exported workbook is not intended to maintain a live connection back to Dynamics 365 Sales, so the content remains a point-in-time representation of the selected view and columns. Microsoft describes this export as a way to create a static Excel worksheet from the records currently displayed in a model-driven app view. See Export data to a static Excel worksheet.

GroupB should use **Excel Online**. This export route opens the selected Dynamics 365 Sales data in the browser-based Excel experience, enabling users to work with the workbook without first managing a locally downloaded file. It is a suitable choice when users need to use Excel Online to inspect, organize, and collaborate around exported account information. The export starts from the data available in the selected view, ensuring that the account records and fields chosen in Dynamics 365 Sales are what users receive in Excel. Microsoft documents the Excel Online export experience for model-driven apps and explains how users can open exported data in Excel for the web at Export data to Excel Online.

Therefore, the completed answer correctly maps GroupA to Static worksheet and GroupB to Excel Online.

QUESTION NO: 10 - (SIMULATION)

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.

ANSWER: See the explanation for the answer

Explanation:

Drag the products as follows:

Host webinars → Microsoft Teams
Host events → Dynamics 365 Marketing

Dynamics 365 Marketing provides event-management capabilities, such as event setup, registration, attendee management, and marketing follow-up. Microsoft Teams can be used as the webinar delivery platform through its integration with Dynamics 365 Marketing, helping avoid the cost of a separate third-party webinar provider.

QUESTION NO: 11

A company is working with a potential customer on a multi-year contract. The customer decides to delay their decision to commit to the contract.

You want to find other colleagues who have interacted with the potential customer so that you can discuss strategies with the colleagues to close the deal with the customer.

Which app should you recommend?

A. Power Virtual Agents

B. Sales Insights

C. Customer Service Insights

D. Market Insights

ANSWER: B

Explanation:

Sales Insights is correct because its relationship intelligence capabilities help sellers understand the strength and history of their organization’s interactions with a customer. In Dynamics 365 Sales, relationship analytics can use communications and activity data to provide relationship health information and identify people within the seller’s organization who have relevant connections to an account or contact. This gives the sales team a practical way to locate colleagues who have already

engaged with the potential customer, learn from those interactions, and coordinate an informed strategy for advancing a delayed, high-value opportunity.

This scenario is specifically about improving collaboration and deal progression by uncovering internal relationship knowledge, rather than handling support cases, gathering broad market research, or automating customer conversations. Relationship intelligence is designed to make these existing connections visible to the sales team, helping sellers engage the appropriate internal stakeholders at the right time. Microsoft documents the relationship analytics features in Relationship analytics in Dynamics 365 Sales and describes Sales Insights capabilities in Dynamics 365 Sales Insights overview.

QUESTION NO: 12

A company uses Dynamics 365 Field Service.

The company needs to manage the stock of replacement parts carried by technicians in service vehicles.

Which two features should the company use? Each correct answer presents part of the solution.

NOTE: Each correct selection is worth one point.

A. Warehouses

B. Inventory transfers

C. Entitlements

D. Marketing lists

ANSWER: A B

Explanation:

Warehouses are used in Dynamics 365 Field Service to represent locations where inventory is stored. A warehouse can represent a fixed facility or a mobile location, such as a service vehicle.

Inventory transfers are used to move product quantities between warehouses. The company can use transfers to replenish a technician's vehicle from a central warehouse and maintain accurate inventory quantities for both locations.

These features provide the inventory structure needed to track and replenish parts used in field work. For details, see Set up warehouses and inventory and Transfer inventory between warehouses.

QUESTION NO: 13

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

B. Use Customer Voice to collect and analyze survey results

C. Use Power Automate to automatically send Customer Voice surveys

D. Create surveys in Dynamics 365 Marketing by using Questionnaire

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

ANSWER: B C

Explanation:

Use Customer Voice to collect and analyze survey results because Dynamics 365 Customer Voice is Microsoft's survey-feedback solution and is designed to store, manage, and analyze feedback in the Dataverse environment used by Dynamics 365 apps. Customer Voice can associate survey invitations and responses with Dynamics 365 records, providing the needed connection to prospect information and eliminating the isolated, manually managed third-party process. Its survey projects, response data, satisfaction metrics, and reporting capabilities centralize the collection and analysis work.

Use Power Automate to automatically send Customer Voice surveys because Customer Voice includes Power Automate integration for survey-invitation workflows. A flow can run when a relevant Dataverse event occurs, such as creation or update of a prospect-related record, and send a personalized survey invitation to the appropriate recipient. This provides an automated, repeatable process while preserving response context for follow-up and analysis in Dynamics 365. Microsoft documents Customer Voice as a feedback-management service integrated with Dynamics 365 and describes the available Power Automate capabilities for automating survey invitations and related processes. See Dynamics 365 Customer Voice documentation and send Customer Voice survey invitations by using Power Automate.

QUESTION NO: 14

A company uses Dynamics 365 Customer Service. The customer service department for a retailer hires temporary employees to work during peak seasons.

Temporary employees take much longer to resolve cases than seasoned employees.

You need to recommend features that will help employees find information needed to resolve cases.

Which two options should you recommend? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

A. Knowledge base with Relevance search

B. Parent and Child case settings

C. Case management with Related Similar cases

D. Routing rule sets

ANSWER: A C

Explanation:

Knowledge base with Relevance search helps temporary customer service representatives quickly locate approved support content while they work on a case. Knowledge articles can capture established troubleshooting steps, policies, product details, and resolutions created by experienced staff. Relevance search uses the search terms and the indexed knowledge content to return useful articles, reducing the time required for an employee to identify guidance and provide a consistent response. Microsoft describes knowledge management as a way to make reliable information available to agents directly in Customer Service: Microsoft Learn: Knowledge management overview.

Case management with Related Similar cases gives representatives access to prior cases that resemble the active case. Reviewing similar historical cases lets a new or temporary employee see symptoms, customer context, actions taken, and successful resolutions from earlier work. This supports faster resolution without requiring the employee to have the same level of product and process experience as seasoned agents. Dynamics 365 Customer Service can suggest similar cases based on the case information, enabling agents to reuse relevant resolution knowledge and investigate proven approaches: Microsoft Learn: Use AI to suggest similar cases.

QUESTION NO: 15 - (HOTSPOT)

HOTSPOT

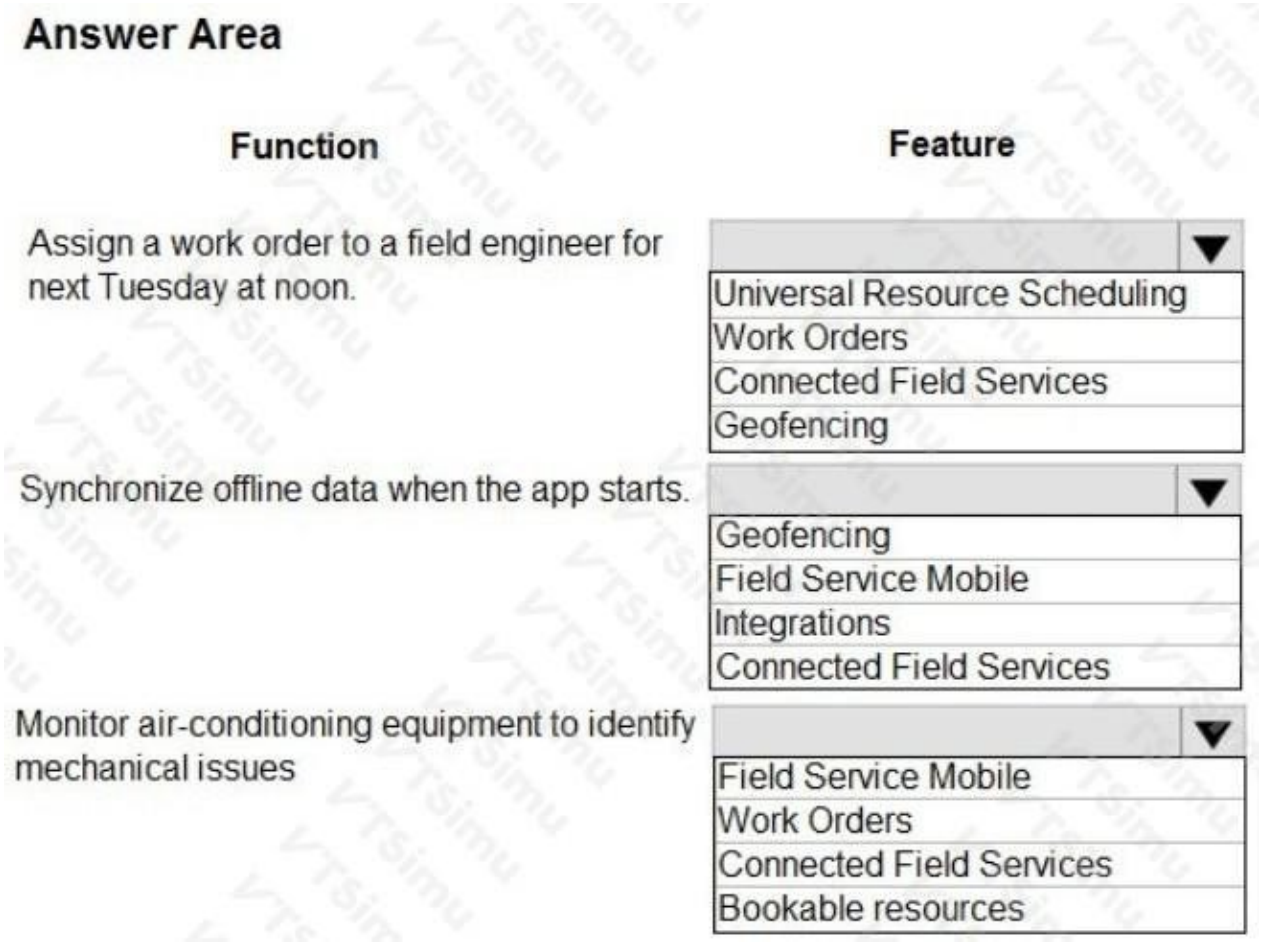
A company that services air-conditioning equipment is implementing Dynamics 365 Field Service.

You need to recommend the features that the company should implement to meet business requirements.

Which features should you recommend? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:



ANSWER:

Answer Area

Function	Feature
Assign a work order to a field engineer for next Tuesday at noon.	Universal Resource Scheduling **Work Orders** Connected Field Services Geofencing
Synchronize offline data when the app starts.	Geofencing **Field Service Mobile** Integrations Connected Field Services
Monitor air-conditioning equipment to identify mechanical issues	Field Service Mobile Work Orders **Connected Field Services** Bookable resources

Explanation:

Universal Resource Scheduling should be used to assign a work order to a field engineer for next Tuesday at noon. This scheduling capability is designed to match work that needs to be performed with an appropriate resource and a defined time slot. In Dynamics 365 Field Service, dispatchers can use schedule boards and scheduling tools to identify available technicians, account for working hours and requirements, and book the work at the requested appointment time. This provides the planning and assignment process needed for a future field-service visit. Microsoft describes the relationship between work orders, resources, and scheduling in its schedule a work order documentation.

Field Service Mobile should be used for synchronizing offline data when the app starts. Field technicians often work in locations with unreliable or unavailable connectivity, so the mobile application supports offline access to the Field Service information required to perform their assigned work. Offline synchronization lets technicians work with local data and exchange updates when connectivity is available. The synchronization behavior and offline capabilities are part of the mobile experience described in Microsoft's Field Service Mobile offline documentation.

Connected Field Services should be used to monitor air-conditioning equipment and identify mechanical issues. Connected Field Service integrates Internet of Things device signals with Field Service so that telemetry, alerts, and device conditions can be monitored. When equipment reports conditions that indicate a potential failure or required maintenance, the organization can use that information to proactively initiate service processes. This helps move service delivery from reactive repair toward predictive maintenance. Microsoft covers this connected-device scenario in its Connected Field Service documentation.

QUESTION NO: 16 - (SIMULATION)

A company uses Dynamics 365 Field Service.

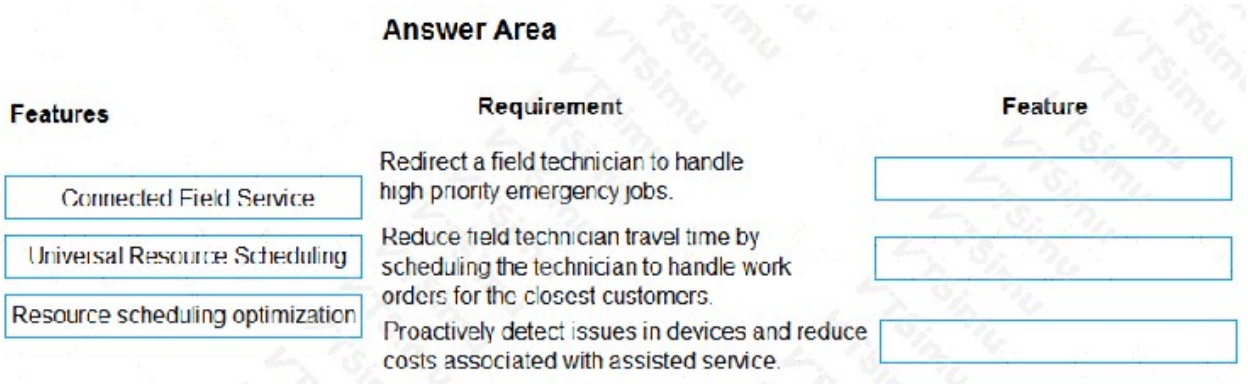
The company uses a manual process to create and schedule work orders. The company wants to optimize scheduling and reduce assisted support costs.

You need to recommend appropriate features of Dynamics 365 Field Service to meet the requirements. Which feature should you recommend? To answer, drag the appropriate features to the correct requirements.

Each feature 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:

Assign the features as follows:

Universal Resource Scheduling provides the schedule board and dispatch capability to reassign a technician for urgent work. Resource Scheduling Optimization automatically optimizes schedules, including minimizing travel time. Connected Field Service uses connected/IoT devices to monitor assets and proactively identify service needs.

QUESTION NO: 17

A company plans to use Dynamics 365 Sales.

The company requires every AI feature related to sales be available.

You need to determine which solution to use.

Which solution should you identity?

A. Dynamics 365 Sales Professional

B. Dynamics 365 Sales Premium

C. Dynamics 365 Sales Enterprise

ANSWER: B

Explanation:

Dynamics 365 Sales Premium is the appropriate solution because it provides the most comprehensive Dynamics 365 Sales licensing tier for organizations that require the complete set of sales-focused AI capabilities. Sales Premium includes the core capabilities of Dynamics 365 Sales Enterprise and adds advanced Sales Insights functionality. These AI-driven capabilities support sellers and managers with features such as predictive lead and opportunity scoring, relationship analytics, conversation intelligence, and sales forecasting insights. Together, these tools help teams prioritize customer interactions, identify risk and opportunity signals, analyze sales calls, and make more informed decisions throughout the sales process.

Microsoft positions Sales Premium for organizations that need advanced intelligence and insights embedded in the sales experience, rather than only standard sales force automation. Selecting this license ensures that the organization can use the full Sales Insights capability set without needing to limit its design to a reduced feature package. Microsoft's licensing guidance describes Sales Premium as including Sales Enterprise capabilities together with Sales Insights features. See the Dynamics 365 Sales overview and Dynamics 365 Sales Premium overview.

QUESTION NO: 18

Customers submit suggestions, questions, and cases to a company by using the following channels:

• Submitting a case in a customer service portal.

• Emailing a support mailbox.

• Calling a telephone number.

The company has two departments. Each department has a defined list of agents. The company distributes all submissions to the correct department.

You need to show the agents how the submissions are stored.

Which format is used for the submissions?

A. Work items

B. Queues

C. Work orders

D. Activities

ANSWER: B

Explanation:

Queues are the correct format because Dynamics 365 Customer Service uses queues as containers for work that must be reviewed, assigned, and handled by a group of agents. A queue can represent a department, team, support mailbox, or another work distribution point. Customer submissions, including cases created through a portal, email messages received through a monitored mailbox, and phone-related records, can be made available as queue items for the appropriate department.

Each department can have its own queue and defined membership, allowing the organization to route incoming customer requests to the group responsible for resolving them. Agents can then view the queue's available items, select work, or have work assigned according to the organization's process. This provides a shared and organized backlog of incoming service requests rather than tying every submission immediately to an individual agent.

Microsoft describes queues as a central location for managing activities and cases that require action, including routing items to people or teams. For more information, see Create and manage queues and Queue management in Customer Service.

QUESTION NO: 19 - (DRAG DROP)

DRAG DROP

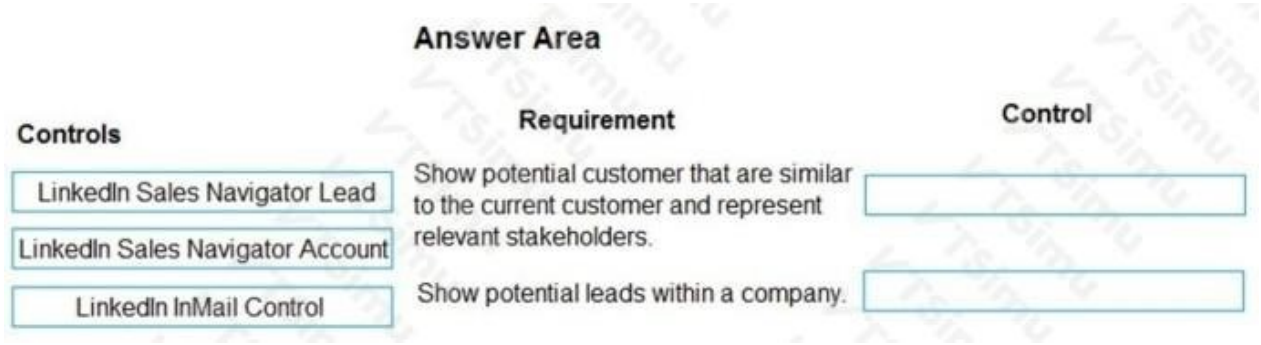
A company plans to implement Dynamics 365 Sales with LinkedIn Sales Navigator.

You need to determine the controls that you should implement.

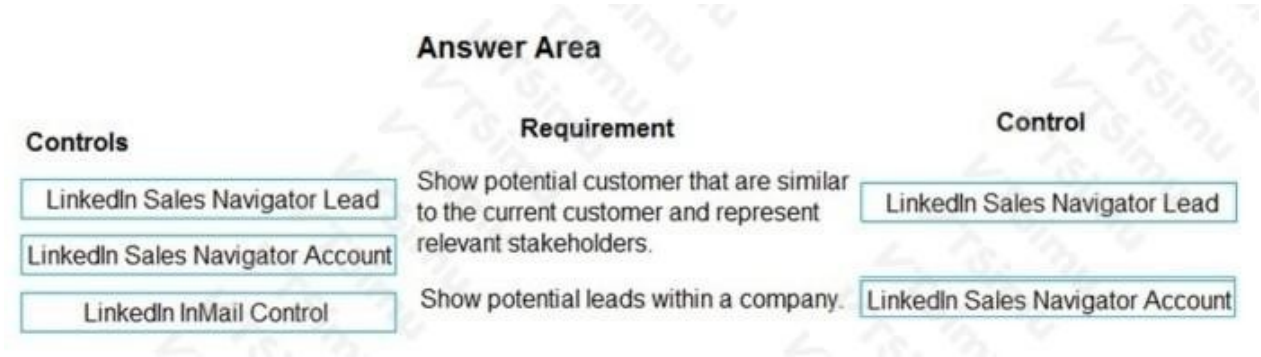
Which controls should you use? To answer, drag the appropriate controls to the correct requirement. Each control may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

Select and Place:



ANSWER:



Explanation:

LinkedIn Sales Navigator integration adds contextual Sales Navigator experiences to Dynamics 365 Sales records so sellers can research the people and organizations connected to their work without leaving the sales app. The **LinkedIn Sales Navigator Lead** control is the appropriate control for showing potential customers similar to the person currently being viewed and for helping a seller identify relevant stakeholders. Its purpose is centered on individual LinkedIn members: it presents lead-oriented information and recommendations that help a seller find people connected to the sales effort, including people who may be relevant decision makers or influencers for the opportunity.

The **LinkedIn Sales Navigator Account** control is the appropriate control for showing potential leads within a company. This control is based on an organization rather than an individual person. When used with an account in Dynamics 365 Sales, it gives the seller company context and helps surface LinkedIn members associated with that company. This supports account research and account-based selling by enabling the seller to discover the people at the organization who could become sales leads or stakeholder contacts.

Together, these controls align the Sales Navigator experience with the Dynamics 365 record context: the lead control supports person and stakeholder discovery, while the account control supports discovery of people inside a selected company. Microsoft describes the available embedded Sales Navigator controls and their use in its LinkedIn Sales Navigator integration documentation. Additional Sales Navigator integration setup and feature context is available in the Dynamics 365 LinkedIn integration documentation.

QUESTION NO: 20

You work for a job placement agency that uses Dynamics 365 Project Operations.

A client needs an expert plumber to handle an emergency situation at their office.

You need to identify an expert plumber for the client.

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. Open the Resource Manager Dashboard and filter Role Utilization by the term expert plumber.

B. Open the client's project Gantt chart and filter by the term expert plumber.

C. Open the Resource Utilization board and filter by the term expert plumber.

D. Open the Schedule board and filter by the term expert plumber.

ANSWER: C D

Explanation:

Opening the Resource Utilization board and filtering by the term expert plumber is a valid way to locate a suitable resource. The Resource Utilization view helps resource managers examine resource allocation and availability information, and its filters can narrow the displayed resources to those matching the relevant role or resource criteria. When the plumber expertise is represented in the organization's resource setup, this allows the agency to identify an appropriate person while considering whether that person has capacity for an urgent assignment.

Opening the Schedule board and filtering by the term expert plumber is also a complete solution. The Schedule board provides a visual view of resources and their bookings, enabling dispatchers and resource managers to search or filter the available resource pool and assess a resource's schedule. This is especially useful for an emergency request because the agency can find a resource with the required expertise and promptly see open time that can be booked for the client's work. In practice, resource roles, characteristics, and availability should be maintained accurately so that filtering and scheduling produce reliable matches. For more information, see View resource utilization in Project Operations and Use the schedule board.

QUESTION NO: 21

An air conditioning company uses Dynamics 365 Field Service.

When a problem is detected with a customer's air conditioning system, a new case must be opened automatically.

You need to recommend a solution for the company.

What should you recommend?

A. Field Service Mobile

B. Work orders

C. Connected Field Service

D. Universal Resource Scheduling

E. Case management

ANSWER: C

Explanation:

Connected Field Service is the appropriate recommendation because it extends Dynamics 365 Field Service with Internet of Things (IoT) capabilities. The company can connect monitored air-conditioning equipment to Dynamics 365 so that telemetry, such as a fault condition, abnormal temperature, or device error, is reported as an IoT alert. IoT alert rules can then automate the appropriate business response, including creating a case when the detected condition requires customer-service follow-up. This enables proactive service: the organization can identify and act on an equipment problem as soon as it is detected rather than waiting for the customer to report it. Connected Field Service also provides a foundation for subsequent service processes, such as evaluating the alert, creating work orders when onsite service is needed, and scheduling a technician. This direct integration of device monitoring, alerts, and automated Dynamics 365 records is specifically designed for scenarios involving connected customer equipment. For implementation and feature details, see Connected Field Service overview and Configure IoT alert rules in Field Service.