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Microsoft Dynamics 365
Customer Service
Functional
Consultant

Certification Questions
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Microsoft Dynamics 365 Customer Service Functional Consultant Sample Questions (Q190-Q195):

NEW QUESTION # 190

You are using Dynamics 365 for Customer Service. You have existing routing rules.

You need to create a routing rule for cases and bulk-import cases.

Which actions should you perform? To answer, select the appropriate action in the dialog box in the answer area.

NOTE: Each correct selection is worth one point.

Scenario	Action
The existing route rule action that the system automatically invokes when the new rule is activated.	The routing rule is deleted The routing rule does not change The routing rule is deactivated
Import bulk cases without the routing rule affecting the imported cases.	Create a column in a spreadsheet named RouteCase and add the value No for all records Create a column in a spreadsheet named RouteCase and add the value No routing for all records Save the spreadsheet as a delimited file for import Manually add each record

Answer:

Explanation:

Scenario	Action
The existing route rule action that the system automatically invokes when the new rule is activated.	The routing rule is deleted The routing rule does not change The routing rule is deactivated
Import bulk cases without the routing rule affecting the imported cases.	Create a column in a spreadsheet named RouteCase and add the value No for all records Create a column in a spreadsheet named RouteCase and add the value No routing for all records Save the spreadsheet as a delimited file for import Manually add each record

NEW QUESTION # 191

You are using Dynamics 365 Customer Service. You are viewing a knowledge base (KB) article from a case record. Knowledge management is set up to use an external portal.

You need to link the article to the case and share the article with the customer.

What is the solution for each requirement? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Requirement	Solution
Attach and email a KB article from a case.	Select Link article to the case and email content. Link the KB article to the case. The system will automatically email the KB article to customer. Link the KB article to the case. Create an email activity and attach the KB article as a PDF.
Attach a KB article and email a link to the customer.	For the published KB article, select Link the KB article to the case and email the link to the customer. For the approved KB article, select Link the KB article to the case and email the link to the customer. Link the KB article to the case. Create an email activity and select Insert article.

Answer:

Explanation:

Requirement	Solution
Attach and email a KB article from a case.	Select Link article to the case and email content. Link the KB article to the case. The system will automatically email the KB article to customer. Link the KB article to the case. Create an email activity and attach the KB article as a PDF.
Attach a KB article and email a link to the customer.	For the published KB article, select Link the KB article to the case and email the link to the customer. For the approved KB article, select Link the KB article to the case and email the link to the customer. Link the KB article to the case. Create an email activity and select Insert article.

Explanation

Text Description automatically generated

Requirement	Solution
Attach and email a KB article from a case.	<p>Select Link article to the case and email content</p> <p>Link the KB article to the case. The system will automatically email the KB article to customer.</p> <p>Link the KB article to the case. Create an email activity and attach the KB article as a PDF.</p>
Attach a KB article and email a link to the customer.	<p>For the published KB article, select Link the KB article to the case and email the link to the customer.</p> <p>For the approved KB article, select Link the KB article to the case and email the link to the customer.</p> <p>Link the KB article to the case. Create an email activity and select Insert article.</p>

Reference:

<https://docs.microsoft.com/en-us/dynamics365/customer-service/find-knowledge-articles-within-record-dynamic>

NEW QUESTION # 192

A company is implementing Omnichannel for Customer Service.

You must set up the system to minimize human error and automate actions. The requirements to set up the system are as follows:

- * Representatives must create a new support record when a customer contacts them through chat.
- * Knowledge base articles must open in a separate tab when representatives research answers.
- * When a knowledge base article resolves a customer issue, representatives must send the article to the customer via chat.

You need to set up the macros.

Which macro type should you use? To answer, drag the appropriate macro types to the correct requirements.

Each macro 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.

Macro types	Answer Area	Macro type
Flow connector	Requirement	
Session connector	Open new form, and then create a record.	
Omnichannel connector	Open a new application tab.	
Productivity automation	Send a knowledge base article in chat.	

Answer:

Explanation:

Macro types	Answer Area	Macro type
Flow connector	Requirement	Productivity automation
Session connector	Open new form, and then create a record.	Session connector
Omnichannel connector	Open a new application tab.	Omnichannel connector
Productivity automation	Send a knowledge base article in chat.	

Explanation

Graphical user interface, text, application Description automatically generated

Macro types	Answer Area
Flow connector	Requirement Open new form, and then create a record.
Session connector	Macro type Productivity automation
Omnichannel connector	Open a new application tab.
Productivity automation	Send a knowledge base article in chat .

Microsoft

Box 1: Productivity automation

Productivity automation

As an administrator, you can use the actions any number of times across different macros to automate and perform model-driven app operations.



← Search macro Action

 Open a new form to create a record
Productivity automation

 Open an existing record
Productivity automation

 Open a record grid
Productivity automation

The following screenshot shows the actions that are explained in the subsequent sections.

Box 2: Session connector

Session connector

As an administrator, you can use the actions any number of times across different macros to automate and perform operations related to a session in Customer Service workspace.

Trigger	Action
	Get the current tab Session connector
	Open application tab Session Connector

Microsoft

← Search macro Action

Trigger Action


 Get the current tab
Session connector

 Open application tab
Session Connector

Graphical user interface, application Description automatically generated Box 3: Omnichannel connector

Omnichannel connector As an administrator, you can use the actions any number of times across different macros to automate and perform operations related to Omnichannel for Customer Service.

Graphical user interface, text, application, email Description automatically generated



← Search macro Action



Send KB article in chat
Omnichannel Connector

ⓘ



Link record to the conversation
Omnichannel connector

ⓘ



Unlink record from the conversation
Omnichannel connector

ⓘ

Don't see what you need?



Let us know what you would like us to build next

Reference:

<https://docs.microsoft.com/en-us/dynamics365/app-profile-manager/macros>

NEW QUESTION # 193

A company implements Dynamics 365 Customer Service.

You are setting up scheduling to dispatch repair technicians. You encounter the following issues:

You are unable to create a new organizational unit.

Repair technicians are accidentally scheduled to work on days when company is on holiday.

RepairTechnicianA does not appear on the schedule for Fridays for any issue.

You need to resolve the issues.

What should you modify to correct the issues? To answer, drag the appropriate resolutions to the correct issues. Each source 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.

Resolutions

Resources

Security roles

Working hours

Business closures

Answer Area

Issue

You are unable to create a new organizational unit

Issue	Resolution
You are unable to create a new organizational unit	<div style="border: 1px dashed #ccc; width: 150px; height: 100px; margin-bottom: 10px;"></div> <div style="border: 1px dashed #ccc; width: 150px; height: 100px; margin-bottom: 10px;"></div>
Repair technicians are scheduled to work on days when company is on holiday	
RepairTechnicianA does not appear on the schedule for Fridays	

Repair technicians are scheduled to work on days when company is on holiday

RepairTechnicianA does not appear on the schedule for Fridays

Answer:

Explanation:

Resolutions	Answer Area	
	Issue	Resolution
Resources	You are unable to create a new organizational unit	
Security roles	Repair technicians are scheduled to work on days when company is on holiday	Security roles
Working hours	RepairTechnicianA does not appear on the schedule for Fridays	Business closures
Business closures		Working hours

NEW QUESTION # 194

A Dynamics 365 Customer Service organization uses routing rules to escalate cases.

Security roles have not been modified or created.

You need to modify the routing rule set that is currently in use and enforce the principle of least privilege.

Which five 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.

Actions	Answer Area
Verify that you have the customer service representative security role.	 <div style="border: 1px solid #ccc; padding: 5px; display: flex; align-items: center; justify-content: space-between;"> ◀ ▶ </div>
Deactivate the routing rule set.	
Verify that you have the customer service manager security role.	
Activate the routing rule set.	
Navigate to Routing rule sets.	
Edit the routing rule set.	
Publish the customizations.	

Answer:

Explanation:

Verify the you have the customer service manager security role.

Navigate to Routing rule sets.

Deactivate the routing rule set.

Edit the routing rule set.

Activate the routing rule set.

1 - Verify the you have the customer service manager security role.

2 - Navigate to Routing rule sets.

3 - Deactivate the routing rule set.

4 - Edit the routing rule set.

5 - Activate the routing rule set.

Reference:

<https://docs.microsoft.com/en-us/dynamics365/customer-service/create-rules-automatically-route-cases>

NEW QUESTION # 195

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