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NEW QUESTION: 1

Case Study 1 - Fabrikam, Inc

Background

Fabrikam, Inc. is a mid-sized global company that provides outsourced customer support services for retail and telecommunications clients. The company operates multiple regional contact centers. Fabrikam, Inc. is transitioning to a unified cloud-based platform by implementing Microsoft Dynamics 365 Contact Center. The goal is to improve customer satisfaction, reduce average handling time, and increase workforce productivity while enabling AI-assisted customer interactions. Fabrikam, Inc. has an established Microsoft ecosystem, including Microsoft Azure and Microsoft Power Platform. The company requires that all implementations follow best practices for scalability, maintainability, and governance, while aligning with internal governance and security standards.

Current environment

Contact Center infrastructure

- Fabrikam, Inc. currently uses an outdated on-premises telephony system that does NOT integrate with modern CRM systems.
- The company is migrating to Dynamics 365 Contact Center to support voice-based interactions.
- Azure resources are centrally managed by the IT team.
- Azure Application Insights is provisioned but not yet connected to any contact center workload.
- Microsoft Entra ID is used for identity and access management.

Application lifecycle management (ALM)

- The company maintains separate development, test, and production environments in Microsoft Dataverse.
- Solutions are deployed as managed or unmanaged depending on the environment.
- Configuration data must be moved between environments without manual recreation.
- The IT team requires repeatable and governed deployment processes.

Users and roles

- Customer service representatives (CSRs) handle inbound customer calls.
- Supervisors monitor performance and manage workforce scheduling.
- Administrators configure and maintain the system.
- Roles are defined for CSRs, supervisors, and administrators, but permissions are not consistently enforced.
- Access must be restricted based on user responsibilities to enforce least privilege.

Business requirements

Voice channel

- Customers must be able to contact customer support through an inbound voice channel.
- Incoming calls must be routed to available CSRs based on predefined criteria.
- Customer input must be collected through an automated interaction before routing.
- Some inquiries must be resolved without involving a human representative.
- When escalation is required, CSRs must receive relevant information collected earlier in the interaction.

Workforce management (WFM)

- Supervisors must define shifts and assign schedules for CSRs.
- CSRs must receive interactions during their scheduled shifts only.
- Some shifts must allow for times that do NOT accept phone calls.
- WFM capabilities must be enabled within the contact center solution.

AI and automation

- The solution must support AI-driven capabilities to handle frequently asked customer questions.
- The system must support generative AI for natural, conversational interactions.
- When an issue cannot be resolved automatically, escalation paths must be defined.

Routing and work assignment

- Customer interactions must be managed through a structured process to ensure consistent handling.
- Information collected during the voice agent interactions must be available to CSRs.
- CSRs must be assigned to handle interactions based on their expertise.

Analytics and monitoring

- The company must monitor conversation performance and identify and troubleshoot issues affecting customer experience.
- The solution must provide detailed diagnostic information to support troubleshooting across the interaction lifecycle.
- Supervisors must be able to analyze interaction quality and identify trends and bottlenecks.

Technical requirements

Voice channel configuration

- Dynamics 365 Contact Center must be used to support voice-based customer interactions.
- The solution must support inbound calling through configured phone numbers.
- Voice interactions must be routed in a way that follows best practices for scalability and consistent performance.

IVR and voice agents

- IVR flows must support both naturally spoken input and keypad input.
- Voice agents must be configured by using Copilot Studio.
- AI agents must be able to retrieve customer data from backend systems when needed.

Security and access

- Access must be restricted based on user responsibilities and follow the principle of least privilege.
- CSRs must access records relevant to only the interactions they handle.
- Supervisors must have visibility into CSR performance and schedules.
- Administrators must have full access to configure and manage the solution.

ALM and deployment

- Production deployments must use managed solutions.
- Configuration data must be moved between environments by using supported tools and without manual recreation.
- Deployment processes should be automated to ensure consistency and reliability.

Issues

- The current system lacks integration between voice interactions and CRM systems.
- CSRs receive calls outside of their scheduled shifts.
- Fabrikam, Inc. has no consistent process for deploying configurations across environments.
- AI capabilities are underused, resulting in increased interaction volumes.
- Some customers interact from a noisy environment, which makes it difficult for CSRs and agents to serve them efficiently.
- Supervisors lack visibility into detailed conversation diagnostics.
- Access permissions are not consistently aligned with user responsibilities, causing access inconsistencies.

Drag and Drop Question

You need to design voice interactions that resolve the caller interaction issues.

Which input method should you configure? To answer, move the appropriate features to the correct requirements. You may use each feature once, more than once, or not at all. You may need to move the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

Features

Entity extraction

Intent classification

Speech transcription

Numeric menu selection

Input methods for voice interactions

Requirement

Caller interacts from a noisy environment.

Caller interacts from a quiet environment.

Feature



Answer:



Explanation:

Scenario: Some customers interact from a noisy environment, which makes it difficult for CSRs and agents to serve them efficiently.

Box 1: Numeric menu selection

Background noise easily distorts spoken words, causing automated systems to fail. Dual-Tone Multi-Frequency (DTMF) keypad presses bypass acoustic interference entirely, ensuring 100% accurate data transmission.

Box 2: Speech transcription

In a quiet space, Natural Language Processing (NLP) shines. The system can accurately convert speech to text, identify the user's goal (intent), and pull specific details like account numbers (entities) for a seamless, hands-free experience.

Reference:

<https://learn.microsoft.com/en-us/dynamics365/customer-service/implement/voice-channel-best-practices>

NEW QUESTION: 2

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ALM and deployment

- Production deployments must use managed solutions.
- Configuration data must be moved between environments by using supported tools and without manual recreation.
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Issues

- The current system lacks integration between voice interactions and CRM systems.
- CSRs receive calls outside of their scheduled shifts.
- Fabrikam, Inc. has no consistent process for deploying configurations across environments.
- AI capabilities are underused, resulting in increased interaction volumes.
- Some customers interact from a noisy environment, which makes it difficult for CSRs and agents to serve them efficiently.
- Supervisors lack visibility into detailed conversation diagnostics.
- Access permissions are not consistently aligned with user responsibilities, causing access inconsistencies.

Drag and Drop Question

You need to design AI-driven interactions based on the voice channel business requirements.

How should you perform the configurations? To answer, move the appropriate features to the correct requirements. You may use each feature once, more than once, or not at all. You may need to move the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

Features

Queue-based routing

Intent-based interaction flow

Context variable configuration

Escalation with context transfer

Voice agent configuration

Requirement

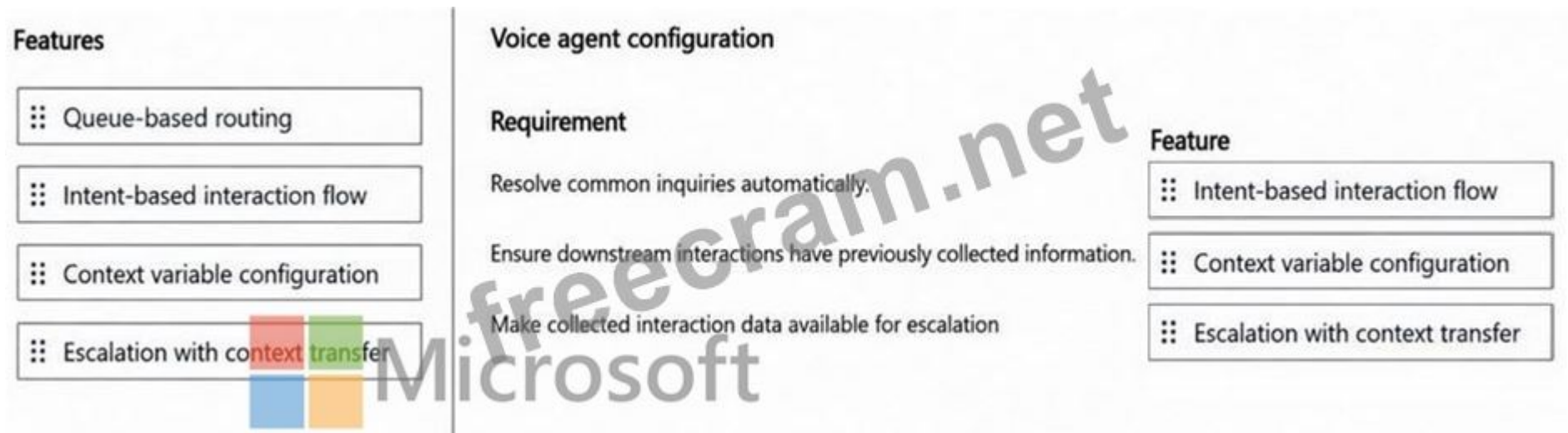
Resolve common inquiries automatically.

Ensure downstream interactions have previously collected information.

Make collected interaction data available for escalation

Feature

Answer:



Explanation:

Box 1: Intent-based interaction flow

An Intent-based interaction flow is the setup that directly addresses the problem of automatically resolving common inquiries.

Automatic Resolution: This setup uses Natural Language Processing (NLP) to understand what the caller wants (their "intent") and matches it to pre-configured bot topics. For common inquiries like "What is my order status?" or "How do I reset my password?", the AI agent can complete the task and resolve the issue without human intervention.

Self-Service Efficiency: It acts as an advanced, conversational IVR (Interactive Voice Response) that deflects high-volume, repetitive calls away from your human agents.

Box 2: Context variable configuration

To share previously collected information with downstream interactions in a Dynamics 365 Contact Center AI voice environment, you should use Context variable configuration.

To ensure that downstream components (like Azure Health Bot, Copilot Studio, or routing engines) can read what the initial voice agent collected, you must first define and map Context Variables.

Context variables act as the storage containers for the data.

Escalation context transfer is simply a mechanism that delivers those containers to a human agent. Without configuring the context variables first, the escalation transfer would have no data to pass.

Box 3: Escalation with context transfer

You should use escalation with context transfer.

In a Dynamics 365 Contact Center environment, passing collected interaction data from an AI- driven Voice channel (such as a Copilot Studio voice agent) to a live human representative is natively handled via contextual transfers.

Eliminates Customer Repetition: When the AI agent escalates the call, the entire conversational history, collected customer details, intent, and progress transfer intact.

Automatic Record Linking: Context variables passed during the escalation allow the routing engine to automatically identify and link customer profiles or existing cases.

Live Transcript Availability: Once a live representative accepts the call, the complete transcript of the AI agent's voice conversation is populated directly onto their conversation widget dashboard.

Scenario: Business requirements, Voice channel

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- When escalation is required, CSRs must receive relevant information collected earlier in the interaction.

Reference:

<https://learn.microsoft.com/en-us/dynamics365/contact-center/administer/set-up-voice-agents-to-use-intents>

<https://learn.microsoft.com/en-us/dynamics365/customer-service/administer/context-variables-for-bot>

<https://learn.microsoft.com/en-us/dynamics365/customer-service/develop/bot-escalate-end-conversation>

NEW QUESTION: 3

A supervisor wants to validate a new routing and bot configuration before rolling it out to live customers, without impacting real conversations.

You need to recommend a capability that lets the team test end-to-end conversation flows safely.

What should you enable?

- A. Agent simulation
- B. Proactive chat
- C. Quality Evaluation agent
- D. Health Agent

Answer: ([SHOW ANSWER](#))

Agent simulation allows administrators and supervisors to run synthetic conversations through configured journeys - including routing, bots, and agent assist - to validate behavior before exposing changes to real customers. The Quality Evaluation agent scores completed real conversations rather than simulating new ones, and the Health Agent proactively investigates operational issues rather than testing journeys.

NEW QUESTION: 4

A company wants supervisors to be able to silently listen in on live calls and, if needed, join the call directly to assist a struggling new representative.

You need to recommend a capability.

What should you configure?

- A. Supervisor actions for conversations, including monitor and barge-in
- B. Call recording and transcription only
- C. Capacity profiles for supervisors
- D. The Quality Evaluation agent

Answer: ([SHOW ANSWER](#))

Supervisor actions on live conversations include capabilities such as silent monitoring and joining ("barge-in") an active call to assist representatives in real time. Recording and transcription are for after-the-fact review, and the Quality Evaluation agent scores completed conversations rather than enabling live intervention.

NEW QUESTION: 5

A company uses skills-based routing for incoming service requests.

The system uses a skill-matching algorithm.

Requests must be assigned only to customer service representatives (CSRs) who are most qualified to solve the issue.

You need to ensure that only qualified CSRs receive work.

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

NOTE: Each correct selection is worth one point.

- A. Configure CSR capacity.
- B. Enable routing rule fallback logic.
- C. Define required skills for CSRs.
- D. Assign proficiency levels to CSR skills.

E. Configure queue-based routing rules.

Answer: ([SHOW ANSWER](#))

To ensure that only the most qualified Customer Service Representatives (CSRs) receive incoming service requests in Dynamics 365 Contact Center, you must configure a structured, skill-based unified routing workflow.

1. Establish Skills and Proficiencies

Before routing can occur, you must define what a "qualified" representative looks like.

[C]

Define Skill Types and Skills: Create categorized tags such as technical knowledge (e.g., product lines), operational categories (e.g., billing, refunds), or language fluencies.

[D]

Assign Skills to CSRs: Map these defined skills and their respective proficiency levels directly to individual Bookable Resource user profiles.

2. Configure Workstream Classification

3. Enforce the Exact Match Algorithm

4. Create Queue Assignment Methods

Reference:

<https://medium.com/@polataydin/skill-based-routing-in-d365-omnichannel-lessons-from-the-field-8aa976fa108f>

NEW QUESTION: 6

A company embeds a chat widget on its public website. Compliance requires that customers accept a data-processing disclosure and provide their order number before the conversation reaches a representative.

You need to configure this requirement with minimal customization.

What should you do?

A. Configure a pre-chat survey with required fields.

B. Configure a custom messaging channel using messaging APIs.

C. Enable real-time translation.

D. Configure automatic customer identification only.

Answer: ([SHOW ANSWER](#))

A pre-chat survey lets administrators collect required information - including consent/disclosure acknowledgment and free-text or structured fields like an order number - before the conversation is routed to a representative, without custom development. Building a custom messaging channel is unnecessary engineering overhead for a native chat widget scenario, and real-time translation and customer identification serve different purposes.

NEW QUESTION: 7

A company uses Dynamics 365 live chat on its website.

The digital team wants the chat experience to use the existing brand kit and style guide of the company and support a more tailored web experience.

The company requires a solution that enables it to control the chat experience through customization.

You need to expand chat behavior beyond default capabilities.

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. Modify functionality by using the live chat SDK.

B. Use the Omnichannel JavaScript API.

C. Configure workstream context variables.

D. Modify chat widget configuration settings.

Answer: ([SHOW ANSWER](#))

[A]

To achieve complete control over the branding, style, and behavioral logic of a Dynamics 365 live chat widget, you can implement a custom chat widget using the Omnichannel Live Chat SDK rather than using the default out-of-the-box widget script.

While the standard Power Platform admin center allows for basic color and logo changes, it cannot fully ingest a complex brand kit or support advanced, tailored web experiences.

[B]

The Omnichannel JavaScript API gives you the code-level control required to deeply customize the visual branding beyond basic settings and dynamically expand chat behavior based on custom website triggers.

Customization and Branding: The standard chat widget configuration settings only allow for basic UI adjustments (like primary colors and logos). To fully align the chat experience with a highly tailored corporate brand kit and style guide, you must use the JavaScript API to manipulate the widget UI or pass custom CSS.

Expanding Chat Behavior: The JavaScript API allows you to programmatically trigger the chat window, listen to web events, pass custom context from the web page in real-time, and control exactly when and how the chat appears to the user based on their browsing behavior.

Incorrect:

[Not C]

Configure workstream context variables: This is used to route chats to specific queues or agents based on data passed from the website. While essential for routing logic, it does not alter the visual style guide or expand the front-end chat behavior.

[Not D]

Modify chat widget configuration settings: This is useful for out-of-the-box changes (e.g., widget theme color, title, and operating hours), but it is too limited to support a fully tailored brand kit or advanced custom behaviors.

Reference:

<https://www.microsoft.com/en-us/dynamics-365/blog/it-professional/2023/04/24/drive-brand-loyalty-with-a-customizable-live-chat-widget-in-dynamics-365-customer-service/>

NEW QUESTION: 8

Legal requires that all voice conversations be recorded, transcribed, and made searchable, and that non-English calls be understandable to English-speaking supervisors reviewing them later.

You need to configure the voice channel to meet these requirements.

What should you configure? (Choose two.)

A. Call recording and transcription

B. Real-time translation

C. Custom presences

D. Quick replies

Answer: ([SHOW ANSWER](#))

Call recording and transcription satisfies the requirement to record and make conversations searchable. Real-time translation allows conversations in other languages to be rendered in a language supervisors and representatives understand. Custom presences control representative availability states, and quick replies are canned text responses - neither addresses recording or translation requirements.

NEW QUESTION: 9

A company maintains product documentation in a third-party knowledge base outside Dataverse.

Representatives need to search that content alongside internal knowledge articles from within the Contact Center productivity panel.

You need to recommend a configuration.

What should you do?

- A. Manually copy all external articles into Dataverse knowledge articles.
- B. Integrate and search the external knowledge source alongside internal knowledge management.
- C. Disable internal knowledge search and use only the external tool separately.
- D. Configure a macro to open the external tool in a new browser tab.

Answer: ([SHOW ANSWER](#))

Dynamics 365 Contact Center supports integrating external knowledge sources so they can be searched together with internal knowledge articles inside the representative's productivity panel, avoiding manual duplication of content or forcing representatives to switch tools.

NEW QUESTION: 10

A company plans to deploy a new customized voice channel from development to test. The voice channel customizations include skills-based routing and a Copilot Studio voice agent.

The deployment package must:

- Include only the components needed for the release.
- Support controlled import into downstream environments.

You need to prepare to release the voice channel and all supported parts.

What should you do?

- A. Export a managed solution and deploy with configuration data by using the release pipeline.
- B. Copy components and data directly between environments.
- C. Export an unmanaged solution and update configurations directly after import.
- D. Move configuration data only and recreate components manually.

Answer: ([SHOW ANSWER](#))

To meet your requirements, you should export a managed solution for your customizations and deploy your configuration data using a release pipeline.

In Dynamics 365 Contact Center, components are split into two categories: solution-aware customization data (like Copilot Studio bots) and configuration data (like skills and routing rules).

Here is how you should structure your deployment package to ensure a minimal, controlled release:

[A]

1. Solution-Aware Components (Managed Solution)

You must create a segmented solution containing only the specific new or modified components needed for this release. Export this from development as a managed solution to ensure controlled updates and clean rollbacks in your test environment.

Include the following components in your solution:

Copilot Studio Bot: The voice agent itself.

Bot Components: Custom topics, entities, or flows built for the agent.

Power Automate Flows: Any cloud flows triggered by the voice channel or bot.

Custom Tables/Columns: Any new schema updates required for the voice experience.

2. Configuration Data (Configuration Migration Tool)

Skills-based routing records are stored as data records rather than schema. Because they are not solution-aware, they cannot be exported inside a Dataverse solution.

You must migrate them using the Dataverse Configuration Migration tool or the Powershell CLI:

Reference:

<https://learn.microsoft.com/en-us/dynamics365/guidance/resources/contact-center-deploy-voice-channel-best-practices>

NEW QUESTION: 11

Drag and Drop Question

A company uses security roles to ensure that its customer service representatives (CSRs) have access only to the features and data required to perform their duties. However, default roles currently grant excessive permissions to CSRs.

The company requires that access be limited as follows:

- Reduce permissions to just the features and data that are required for each CSR role.
- Allow non-administrators to assign roles to CSRs without full system access.

You need to configure the minimal security access for each requirement.

Which action should you perform first for each requirement? To answer, move the appropriate actions to the correct requirements. You may use each action once, more than once, or not at all.

You may need to move the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

Actions

Assign an additional default security role.

Create a custom role for delegated role assignment.

Create a custom security role with required privileges only.

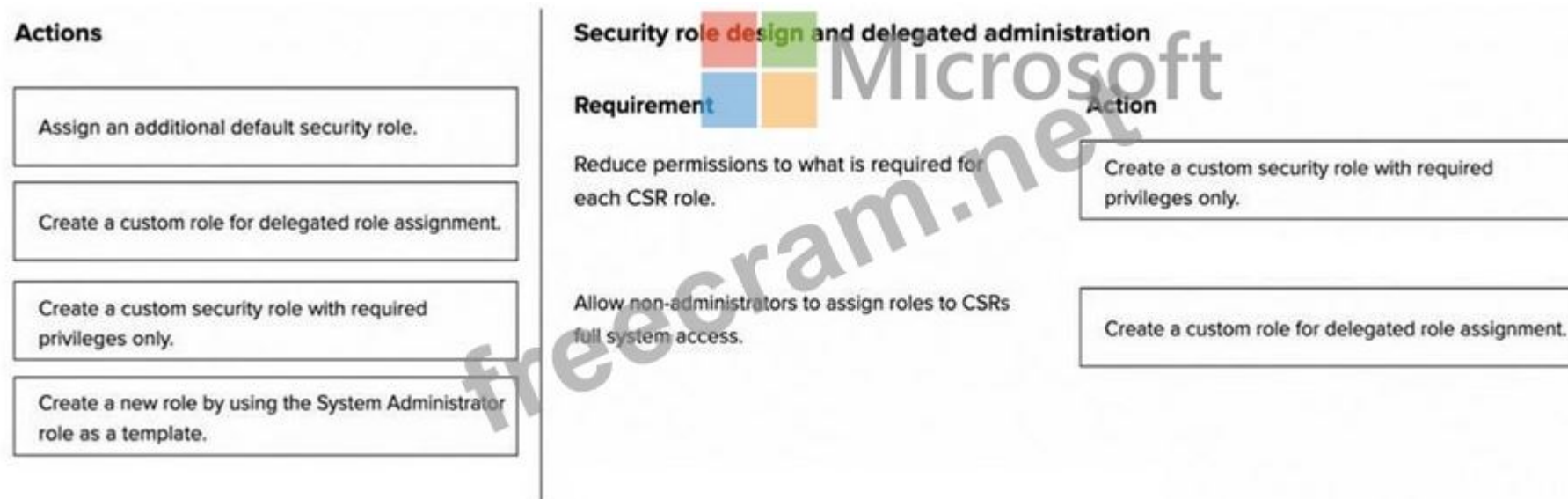
Create a new role by using the System Administrator role as a template.

Security role design and delegated administration

Requirement	Action
Reduce permissions to what is required for each CSR role.	
Allow non-administrators to assign roles to CSRs full system access.	



Answer:



Explanation:

Box 1: Create a custom security role with the required privileges only

To solve this problem, you should create a custom security role with the required privileges only.

Principle of Least Privilege: When default security roles grant excessive permissions, the standard best practice in Microsoft Dynamics 365 is to create a custom security role. This allows you to granularly define exactly which privileges (Read, Write, Append, etc.) and access levels (User, Business Unit, Organization) your customer service representatives (CSRs) need to perform their duties.

How to Implement Safely: It is highly recommended to copy/clone the existing default role, rename it with your organization's prefix (e.g., Contoso CSR - Restricted), and then scale back and remove the excessive permissions. This protects the integrity of the original built-in security roles.

Box 2: Create a custom security role for delegated role assignment.

You can create a custom security role for delegated role assignment. To enable a non-administrator to manage and assign security roles to customer service representatives (CSRs) without granting full System Administrator access, you must configure specific table privileges within the custom role and adhere to Microsoft Dataverse privilege elevation rules.

Required Privileges for the Custom Role

Configure the custom delegated assignment role with the following explicit permissions under the Business Management tab:

Security Role (role) Table: Grant Read and Assign privileges. This enables the user to view available roles and execute the "Manage Roles" command.

User (systemuser) Table: Grant Read and Write privileges so they can access and modify user profiles.

Reference:

<https://www.dynamicpeople.nl/news/tips-for-setting-up-user-security-roles-d365-sales>

<https://learn.microsoft.com/en-us/power-platform/admin/assign-security-roles>

NEW QUESTION: 12

Hotspot Question

A company wants to move Dynamics 365 Contact Center customizations from a development environment to a test environment.

The company must avoid rebuilding the customizations and hard-coding environment-specific values into the deployment package.

You need to prepare the deployment.

Which actions should you perform? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Deployment preparation

Requirement

Move Contact Center customizations between environments without rebuilding them.

Action

▼

Add the customizations to a solution.

Assign the customizations to a security role.

Store the customizations as configuration data.

Avoid hard-coding environment-specific values into the deployment package.

▼

Use direct edits after import.

Use environment variables in the solution.

Use a managed solution with managed properties.



Microsoft

Answer:

Deployment preparation

Requirement

Move Contact Center customizations between environments without rebuilding them.

Avoid hard-coding environment-specific values into the deployment package.

Action

▼

Add the customizations to a solution.

Assign the customizations to a security role.

Store the customizations as configuration data.

▼

Use direct edits after import.

Use environment variables in the solution.

Use a managed solution with managed properties.

Explanation:

Box 1: Add the customizations to a solution.

You must package the customizations into a Dynamics 365 solution.

Customizations (Schema & Logic): Changes to tables, columns, forms, views, security roles, plugins, and Power Automate flows constitute the system's structural blueprint. These must be moved using Solution Export/Import (either managed or unmanaged).

Box 2: Use environment variables in the solution

Use environment variables in the solution to avoid hard-coding environment-specific values during deployment.

Dynamic configuration: Store parameter keys and values (like URLs or IDs) separately from the source code/customizations.

Target assignment: Prompt users or pipelines to supply the correct environment-specific value during import into the test environment.

Managed properties contrast: Managed properties only control whether solution components can be customized further in downstream environments, not data values.

Reference:

<https://learn.microsoft.com/en-us/dynamics365/customer-insights/journeys/transfer-solution>

<https://learn.microsoft.com/en-us/power-pages/configure/environment-variables-for-site-settings>

NEW QUESTION: 13

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear on the review screen.

A company has a custom portal.

The company requires secure customer identity validation before a chat begins.

You need to ensure secure authentication.

Solution: Use pre-chat survey responses combined with session variables to infer user identity.

Does the solution meet the goal?

A. Yes

B. No

Answer: ([SHOW ANSWER](#))

Correct:

* Pass a signed token from an external identity provider during chat initialization Passing a signed JSON Web Token (JWT) from an external identity provider during chat initialization is the correct approach to secure customer identity validation in Dynamics 365 Contact Center.

Token Creation: Your external identity provider generates a signed JWT when the user logs into your custom portal.

Public Key URL: You configure an authentication setting in Dynamics 365 with your public key URL so the system can verify the token's signature Client-Side Function:

A JavaScript client function retrieves the token on widget load.

Initialization: The chat widget uses the token during startup to pass context and establish an authenticated user session instead of an anonymous one.

Incorrect:

* Allow anonymous chat sessions

* Configure chat authentication by using Microsoft Entra ID.

* Use pre-chat survey responses combined with session variables to infer user identity.

Reference:

<https://community.dynamics.com/forums/thread/details/?threadid=71c0f82e-0ff1-ee11-904c-6045bda7c23b>

NEW QUESTION: 14

Hotspot Question

Customer service representatives (CSRs) at a company use a chat channel in Dynamics 365 Customer Service.

The company wants to improve how incoming chats are handled as follows:

- Email addresses must be captured for customer verification before engaging the customer.

- The reason for the contact must be captured before the chat starts and must be used for routing.

You need to configure the chat channel to meet the requirements.

Which action should you perform for each requirement? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Configure incoming chats for answer efficiency and data collection

Requirement

Capture customer email addresses before chat starts.

Action

	▼
Enable authenticated chat sessions.	
Add a required pre-chat survey field.	
Define a context variable in the workflow.	

Send chats to CSRs based on issue category.

	▼
Configure CSR assignment capacity profiles.	
Configure routing rules that use survey responses.	
Configure session templates with contextual data bindings.	

Answer:

Configure incoming chats for answer efficiency and data collection

Requirement	Action
Capture customer email addresses before chat starts.	Enable authenticated chat sessions. Add a required pre-chat survey field. Define a context variable in the workstream.
Send chats to CSRs based on issue category.	Configure CSR assignment capacity profiles. Configure routing rules that use survey responses. Configure session templates with contextual data bindings.

Explanation:

Box 1: Define a context variable in the workstream

To define a context variable in the chat workstream to capture email addresses for customer verification, you should set it up with the following parameters:

Name / Logical Name: Email (Case-sensitive; must exactly match the question key or logical name used in your pre-chat survey or custom JavaScript context provider).

Type: String (Because email addresses contain text characters, they must be stored as primitive string values).

Automatic Record Identification: When a context variable named Email is populated via a pre- chat survey or passed from an authenticated website portal, Omnichannel for Customer Service uses it to query your environment and automatically link the corresponding Contact record to the live conversation session.

Routing and Personalization: Once the context variable is captured, you can leverage it within your unified routing rules to direct the chat to a specialized queue, or use it within customer service representative productivity tools like macros or scripts

Box 2: Configure routing rules that use survey responses.

To achieve this requirement, you must configure a pre-conversation survey on the chat channel and use its answers via context variables to drive route-to-queue rules.

Reference:

<https://learn.microsoft.com/en-us/dynamics365/customer-service/administer/manage-context-variables>

<https://learn.microsoft.com/en-us/dynamics365/customer-service/administer/configure-route-to-queue-rules>

NEW QUESTION: 15

Quality assurance wants completed conversations automatically scored against a consistent rubric (tone, resolution, compliance) instead of supervisors manually reviewing a random sample by hand.

You need to recommend a capability to configure.

What should you use?

A. The Quality Evaluation agent

B. Proactive chat rules

C. The Health Agent

D. Work classification rules

Answer: ([SHOW ANSWER](#))

The Quality Evaluation agent automatically evaluates completed conversations against configured criteria/rubrics, reducing reliance on fully manual sampling-based QA review. The Health Agent focuses on proactive operational issue detection, not conversation quality scoring.

NEW QUESTION: 16

Case Study 1 - Fabrikam, Inc

Background

Fabrikam, Inc. is a mid-sized global company that provides outsourced customer support services for retail and telecommunications clients. The company operates multiple regional contact centers. Fabrikam, Inc. is transitioning to a unified cloud-based platform by implementing Microsoft Dynamics 365 Contact Center.

The goal is to improve customer satisfaction, reduce average handling time, and increase workforce productivity while enabling AI-assisted customer interactions.

Fabrikam, Inc. has an established Microsoft ecosystem, including Microsoft Azure and Microsoft Power Platform. The company requires that all implementations follow best practices for scalability, maintainability, and governance, while aligning with internal governance and security standards.

Current environment

Contact Center infrastructure

- Fabrikam, Inc. currently uses an outdated on-premises telephony system that does NOT integrate with modern CRM systems.
- The company is migrating to Dynamics 365 Contact Center to support voice-based interactions.
- Azure resources are centrally managed by the IT team.
- Azure Application Insights is provisioned but not yet connected to any contact center workload.
- Microsoft Entra ID is used for identity and access management.

Application lifecycle management (ALM)

- The company maintains separate development, test, and production environments in Microsoft Dataverse.
- Solutions are deployed as managed or unmanaged depending on the environment.
- Configuration data must be moved between environments without manual recreation.
- The IT team requires repeatable and governed deployment processes.

Users and roles

- Customer service representatives (CSRs) handle inbound customer calls.
- Supervisors monitor performance and manage workforce scheduling.
- Administrators configure and maintain the system.
- Roles are defined for CSRs, supervisors, and administrators, but permissions are not consistently enforced.
- Access must be restricted based on user responsibilities to enforce least privilege.

Business requirements

Voice channel

- Customers must be able to contact customer support through an inbound voice channel.
- Incoming calls must be routed to available CSRs based on predefined criteria.
- Customer input must be collected through an automated interaction before routing.
- Some inquiries must be resolved without involving a human representative.
- When escalation is required, CSRs must receive relevant information collected earlier in the interaction.

Workforce management (WFM)

- Supervisors must define shifts and assign schedules for CSRs.
- CSRs must receive interactions during their scheduled shifts only.
- Some shifts must allow for times that do NOT accept phone calls.
- WFM capabilities must be enabled within the contact center solution.

AI and automation

- The solution must support AI-driven capabilities to handle frequently asked customer questions.
- The system must support generative AI for natural, conversational interactions.
- When an issue cannot be resolved automatically, escalation paths must be defined.

Routing and work assignment

- Customer interactions must be managed through a structured process to ensure consistent handling.
- Information collected during the voice agent interactions must be available to CSRs.
- CSRs must be assigned to handle interactions based on their expertise.

Analytics and monitoring

- The company must monitor conversation performance and identify and troubleshoot issues affecting customer experience.
- The solution must provide detailed diagnostic information to support troubleshooting across the interaction lifecycle.
- Supervisors must be able to analyze interaction quality and identify trends and bottlenecks.

Technical requirements

Voice channel configuration

- Dynamics 365 Contact Center must be used to support voice-based customer interactions.
- The solution must support inbound calling through configured phone numbers.
- Voice interactions must be routed in a way that follows best practices for scalability and consistent performance.

IVR and voice agents

- IVR flows must support both naturally spoken input and keypad input.
- Voice agents must be configured by using Copilot Studio.
- AI agents must be able to retrieve customer data from backend systems when needed.

Security and access

- Access must be restricted based on user responsibilities and follow the principle of least privilege.
- CSRs must access records relevant to only the interactions they handle.
- Supervisors must have visibility into CSR performance and schedules.
- Administrators must have full access to configure and manage the solution.

ALM and deployment

- Production deployments must use managed solutions.
- Configuration data must be moved between environments by using supported tools and without manual recreation.
- Deployment processes should be automated to ensure consistency and reliability.

Issues

- The current system lacks integration between voice interactions and CRM systems.
- CSRs receive calls outside of their scheduled shifts.
- Fabrikam, Inc. has no consistent process for deploying configurations across environments.
- AI capabilities are underused, resulting in increased interaction volumes.
- Some customers interact from a noisy environment, which makes it difficult for CSRs and agents to serve them efficiently.
- Supervisors lack visibility into detailed conversation diagnostics.

Answer:

Analytic features



Requirement	Feature
Enable troubleshooting of customer interactions.	Telemetry Insights Conversation diagnostics Interaction summary reports Omnichannel real-time analytics
Capture and store telemetry data for analysis.	Dataverse Copilot Studio Azure Application Insights Dynamics 365 Implementation Portal

Explanation:

Box 1: Conversation diagnostics

The correct action to enable troubleshooting of customer interactions is Conversation diagnostics.

Dynamics 365 Contact Center environment, Conversation diagnostics (leveraging Application Insights) provides end-to-end conversation lifecycle telemetry. This allows developers, IT professionals, and supervisors to trace specific routing paths, locate bottlenecks, view non- assignment reasons, and pinpoint the exact stage where a customer's interaction encountered a failure or delay.

Box 2: Azure Application Insights

To capture and store telemetry data for analysis and troubleshooting in a Dynamics 365 Contact Center environment, you must use Azure Application Insights.

Azure Application Insights is the dedicated tool within the Azure monitor ecosystem designed to track, log, and analyze real-time system performance and telemetry.

Scenario:

Analytics and monitoring

- The company must monitor conversation performance and identify and troubleshoot issues affecting customer experience.
- The solution must provide detailed diagnostic information to support troubleshooting across the interaction lifecycle.
- Supervisors must be able to analyze interaction quality and identify trends and bottlenecks.

Reference:

<https://www.microsoft.com/en-us/dynamics-365/blog/it-professional/2023/10/23/use-application-insights-to-diagnose-conversations-in-dynamics-365-customer-service>

<https://learn.microsoft.com/en-us/power-platform/admin/conversation-diagnostics-application-insights>

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NEW QUESTION: 17

Hotspot Question

A company is designing an IVR solution.

The solution must enable the system to:

- Process natural language requests that are NOT predefined.
- Route calls by using predefined menu options.

You need to configure orchestration methods for the system.

How should you configure the solution? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Orchestration configuration

Requirement	Orchestration method
Handle requests that are NOT predefined.	▼ Use intent-based routing rules. Use generative AI orchestration. Configure adaptive dialog routing.
Handle predefined requests.	▼ Use generative AI orchestration. Use deterministic IVR routing rules. Configure entities in the agent settings.



Answer:

Orchestration configuration

Requirement

Handle requests that are **NOT** predefined.

Orchestration method

Use intent-based routing rules.

Use generative AI orchestration.

Configure adaptive dialog routing.

Handle predefined requests.

Use generative AI orchestration.

Use deterministic IVR routing rules.

Configure entities in the agent settings.

Explanation:

Box 1: Use generative AI orchestration

To process natural language requests that are not predefined in a Dynamics 365 Contact Center IVR solution, you should use Generative AI orchestration (or Generative orchestration) powered by Microsoft Copilot Studio.

When setting up IVR agents in the voice channel, Microsoft provides two choices for handling user requests:

Classic Orchestration: The agent matches user queries strictly to predefined topics based on fixed keywords and specific trigger phrases.

Generative AI Orchestration: The agent uses large language models to understand the caller's free-form intent. Instead of matching a hardcoded menu or a specific predefined flow, it dynamically selects the best action, knowledge base article, or conversational topic to answer the query on the fly.

Box 2: Use deterministic IVR routing rules.

For routing calls using predefined menu options (such as DTMF keypad press 1, press 2 or deterministic speech inputs), the appropriate approach is deterministic routing, also referred to as rule-based routing or structured IVR flows, managed via Microsoft Copilot Studio.

Reference:

<https://learn.microsoft.com/en-us/dynamics365/customer-service/administer/configure-bot-virtual-agent>

<https://learn.microsoft.com/en-us/training/paths/work-dynamics-365-contact-center-ivr/>

NEW QUESTION: 18

Hotspot Question

A company uses Dynamics 365 Contact Center to support customer service representatives (CSRs). In addition to internal knowledge articles, the company maintains documentation in external systems.

CSRs require access to both internal and external knowledge when searching for information during customer interactions.

External knowledge is not currently visible in search results. CSRs must switch between systems to find relevant information.

You need to ensure external knowledge is available and searchable within the Contact Center experience.

How should you perform the configurations? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

External knowledge search configuration

Requirement	Configuration
Ensure external knowledge is included in search results.	▼ Configure knowledge search filters. Define external knowledge sources. Configure external search providers.
Ensure external and internal knowledge can be searched together.	▼ Configure Microsoft Graph connectors. Enable relevance search for knowledge articles. Enable federated search across knowledge sources.

Answer:

Requirement	Configuration
Ensure external knowledge is included in search results.	▼ Configure knowledge search filters. Define external knowledge sources. Configure external search providers.
Ensure external and internal knowledge can be searched together.	▼ Configure Microsoft Graph connectors. Enable relevance search for knowledge articles. Enable federated search across knowledge sources.

Explanation:

Box 1: Define external knowledge sources

You should define external knowledge search providers in Microsoft Dynamics 365 to ingest or federated search external documentation directly within the system. To make external documentation searchable for customer service representatives (CSRs), you must configure External Search Providers within the Dynamics 365 Contact Center or Customer Service admin center.

This enables two main approaches:

Federated Search: Dynamics 365 queries the external system in real time (e.g., via a search connector) and displays the results alongside internal knowledge articles.

Knowledge Ingestion (Dataverse Sync): External articles are imported and synced directly into Microsoft Dataverse, allowing them to native behave exactly like internal articles.

Box 2: Enable federated search across knowledge sources

Federated Search: Dynamics 365 queries the external system in real time (e.g., via a search connector) and displays the results alongside internal knowledge articles.

Reference:

<https://learn.microsoft.com/en-us/dynamics365/customer-service/administer/set-up-knowledge-management-embedded-knowledge-search>

NEW QUESTION: 19

A company uses a custom CRM system and an external document repository.

Service representatives must access live CRM data.

Copilot must generate responses grounded in external documents.

The company does NOT allow replication of external data into Dataverse.

The solution must support both real-time data access and Copilot grounding without storing or replicating external data in Dataverse.

You need to provide access to external data without replication or storage.

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

NOTE: Each correct selection is worth one point.

A. Implement Dataverse virtual tables

B. Use workspace-only data providers

C. Configure Copilot prompts

D. Configure Copilot connectors

Answer: ([SHOW ANSWER](#))

Implement Dataverse virtual tables: Use Dataverse virtual tables to connect to the custom CRM system. This allows service representatives to access live CRM data in real time without storing or replicating physical records inside the Dataverse database.

Configure Copilot connectors: Use Copilot connectors or external knowledge/search providers in Copilot Studio to ground responses in the external document repository dynamically at runtime.

Reference:

<https://learn.microsoft.com/en-us/power-apps/maker/data-platform/create-virtual-tables-using-connectors>

NEW QUESTION: 20

Case Study 1 - Fabrikam, Inc

Background

Fabrikam, Inc. is a mid-sized global company that provides outsourced customer support services for retail and telecommunications clients. The company operates multiple regional contact centers. Fabrikam, Inc. is transitioning to a unified cloud-based platform by implementing Microsoft Dynamics 365 Contact Center.

The goal is to improve customer satisfaction, reduce average handling time, and increase workforce productivity while enabling AI-assisted customer interactions.

Fabrikam, Inc. has an established Microsoft ecosystem, including Microsoft Azure and Microsoft Power Platform. The company requires that all implementations follow best practices for scalability, maintainability, and governance, while aligning with internal governance and security standards.

Current environment

Contact Center infrastructure

- Fabrikam, Inc. currently uses an outdated on-premises telephony system that does NOT integrate with modern CRM systems.
- The company is migrating to Dynamics 365 Contact Center to support voice-based interactions.
- Azure resources are centrally managed by the IT team.

- Azure Application Insights is provisioned but not yet connected to any contact center workload.
- Microsoft Entra ID is used for identity and access management.

Application lifecycle management (ALM)

- The company maintains separate development, test, and production environments in Microsoft Dataverse.
- Solutions are deployed as managed or unmanaged depending on the environment.
- Configuration data must be moved between environments without manual recreation.
- The IT team requires repeatable and governed deployment processes.

Users and roles

- Customer service representatives (CSRs) handle inbound customer calls.
- Supervisors monitor performance and manage workforce scheduling.
- Administrators configure and maintain the system.
- Roles are defined for CSRs, supervisors, and administrators, but permissions are not consistently enforced.
- Access must be restricted based on user responsibilities to enforce least privilege.

Business requirements

Voice channel

- Customers must be able to contact customer support through an inbound voice channel.
- Incoming calls must be routed to available CSRs based on predefined criteria.
- Customer input must be collected through an automated interaction before routing.
- Some inquiries must be resolved without involving a human representative.
- When escalation is required, CSRs must receive relevant information collected earlier in the interaction.

Workforce management (WFM)

- Supervisors must define shifts and assign schedules for CSRs.
- CSRs must receive interactions during their scheduled shifts only.
- Some shifts must allow for times that do NOT accept phone calls.
- WFM capabilities must be enabled within the contact center solution.

AI and automation

- The solution must support AI-driven capabilities to handle frequently asked customer questions.
- The system must support generative AI for natural, conversational interactions.
- When an issue cannot be resolved automatically, escalation paths must be defined.

Routing and work assignment

- Customer interactions must be managed through a structured process to ensure consistent handling.
- Information collected during the voice agent interactions must be available to CSRs.
- CSRs must be assigned to handle interactions based on their expertise.

Analytics and monitoring

- The company must monitor conversation performance and identify and troubleshoot issues affecting customer experience.
- The solution must provide detailed diagnostic information to support troubleshooting across the interaction lifecycle.
- Supervisors must be able to analyze interaction quality and identify trends and bottlenecks.

Technical requirements

Voice channel configuration

- Dynamics 365 Contact Center must be used to support voice-based customer interactions.
- The solution must support inbound calling through configured phone numbers.

- Voice interactions must be routed in a way that follows best practices for scalability and consistent performance.

IVR and voice agents

- IVR flows must support both naturally spoken input and keypad input.
- Voice agents must be configured by using Copilot Studio.
- AI agents must be able to retrieve customer data from backend systems when needed.

Security and access

- Access must be restricted based on user responsibilities and follow the principle of least privilege.
- CSRs must access records relevant to only the interactions they handle.
- Supervisors must have visibility into CSR performance and schedules.
- Administrators must have full access to configure and manage the solution.

ALM and deployment

- Production deployments must use managed solutions.
- Configuration data must be moved between environments by using supported tools and without manual recreation.
- Deployment processes should be automated to ensure consistency and reliability.

Issues

- The current system lacks integration between voice interactions and CRM systems.
- CSRs receive calls outside of their scheduled shifts.
- Fabrikam, Inc. has no consistent process for deploying configurations across environments.
- AI capabilities are underused, resulting in increased interaction volumes.
- Some customers interact from a noisy environment, which makes it difficult for CSRs and agents to serve them efficiently.
- Supervisors lack visibility into detailed conversation diagnostics.
- Access permissions are not consistently aligned with user responsibilities, causing access inconsistencies.

Drag and Drop Question

You need to design AI-driven interactions that meet the AI and automation business requirements.

What should you configure for each requirement? To answer, move the appropriate features to the correct requirements. You may use each feature once, more than once, or not at all. You may need to move the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

Features

Generative AI with escalation fallback

Declarative agent with escalation fallback

Generative AI without escalation handling

Keyword-triggered response model with escalation fallback

AI interaction design

Requirement

Support natural, flexible customer conversations.

Ensure unresolved interactions are escalated properly.

Feature

Answer:

Explanation:

Box 1: Generative AI without escalation fallback

The correct feature to use is Generative AI without escalation fallback.

Natural and Flexible Conversations: By utilizing Generative AI, the system can understand user intent dynamically, ask clarifying questions, and reply conversationally rather than relying on rigid, predetermined phrases or strict keywords.

Enterprise Readiness (see Box 2 below): In a Dynamics 365 Contact Center environment, providing a fallback to human agents (escalation handling) is critical. If the generative AI encounters a highly complex issue or an ambiguous request, unified routing seamlessly hands off the interaction to a live agent along with the full conversation history to maintain a positive customer experience.

Box 2: Generative AI with escalation fallback

To ensure that unresolved interactions are escalated properly in a Dynamics 365 Contact Center environment, you must use Generative AI with escalation fallback.

Generative AI allows the virtual or autonomous agent to handle complex, open-ended natural conversations fluidly, understand user intents contextually, and resolve routine issues without forcing users through a rigid menu.

Escalation fallback functions as a vital safety net. If the generative AI is unable to resolve the customer's query or hits its bounds of automation, the system triggers a seamless, context-aware handoff (fallback) to a human representative through intelligent routing. This guarantees the interaction is never dropped and preserves the conversation history so the customer doesn't have to repeat themselves.

Scenario:

AI and automation

- The solution must support AI-driven capabilities to handle frequently asked customer questions.
- The system must support generative AI for natural, conversational interactions.
- When an issue cannot be resolved automatically, escalation paths must be defined.

Reference:

<https://learn.microsoft.com/en-us/dynamics365/contact-center/use/overview-ai-agents-copilot-features>

NEW QUESTION: 21

Drag and Drop Question

A company uses AI-enabled routing.

The customer service manager requires the routing to perform the following:

- Predict required skills automatically.
- Apply predicted skills during routing.

You need to configure the routing to meet the requirements.

Which action should you perform for each requirement? To answer, move the appropriate actions to the correct requirements. You may use each action once, more than once, or not at all. You may need to move the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

Actions	AI skills-based routing
Define manual skill rules.	Requirement: Predict required skills.
Configure an intelligent skill finder model.	Action:
Create a machine learning classification rule.	Requirement: Apply predicted skills.
Assign customer service representatives to skills.	Action:

Answer:

Actions	AI skills-based routing
Define manual skill rules.	Requirement: Predict required skills.
Configure an intelligent skill finder model.	Action: Configure an intelligent skill finder model.
Create a machine learning classification rule.	Requirement: Apply predicted skills.
Assign customer service representatives to skills.	Action: Create a machine learning classification rule.

Explanation:

Box 1: Configure an intelligent skill finder model

To automatically predict required skills for incoming conversations in a Dynamics 365 Contact Center environment with AI-enabled routing, you must configure an Intelligent Skill Finder model.

This machine learning feature eliminates the need to maintain complex manual declarative rules.

Box 2: Create a machine learning classification rule.

To apply predicted skills during routing in Dynamics 365 Contact Center, set up machine learning-based skill classification rulesets using the Intelligent Skill Finder Model.

Add Classification Rulesets: Create a machine learning-based skill classification ruleset in the unified routing workflow and link your trained skill finder model to automatically tag incoming work items with predicted sk.

Reference:

<https://learn.microsoft.com/en-us/dynamics365/customer-service/administer/set-up-skill-based-routing>

NEW QUESTION: 22

A company uses Dynamics 365 Customer Service. The company has a custom table to track internal issues. Customer service representatives (CSRs) track cases separately.

CSRs must be able to resolve issues faster and consistently.

You need to ensure that knowledge articles are available during issue resolution.

What should you do first?

- A. Configure knowledge article relationships for activities
- B. Enable knowledge search for the table
- C. Enable knowledge articles for the table

D. Configure knowledge search providers for case resolution

Answer: ([SHOW ANSWER](#))

To make knowledge articles available for a custom table in Dynamics 365 Customer Service, the step you must take first is to enable knowledge articles for the table (commonly referred to in the system settings as enabling Knowledge Management for the table).

Why this step comes first:

Dataverse Relationship Creation: When you enable knowledge articles/management for a custom table, Dynamics 365 automatically builds the necessary background architecture, including a many-to-many relationship (msdyn_<Entity_Name>_knowledgearticle) between your custom table and the Knowledge Article entity.

Incorrect:

[Not B]

Prerequisite for Search: You cannot add a Knowledge Base Search control to a form or configure knowledge search in the productivity/side pane for a table until that table has officially been enabled to support knowledge management.

Reference:

<https://learn.microsoft.com/en-us/dynamics365/customer-service/administer/add-knowledge-base-search-control-forms>

NEW QUESTION: 23

A company uses a non-Microsoft IVR platform for inbound voice today and wants to keep that IVR while still routing qualified calls into Dynamics 365 Contact Center for representative handling and analytics.

You need to recommend an approach.

What should you do?

- A.** Migrate fully to Copilot Studio voice agents before any integration is possible.
- B.** Integrate the non-Microsoft IVR with the Dynamics 365 Contact Center voice channel.
- C.** Use the chat channel as a workaround for voice.
- D.** Disable the voice channel and rely on callback requests only.

Answer: ([SHOW ANSWER](#))

Dynamics 365 Contact Center voice channel supports integrating third-party/non-Microsoft IVR systems so that existing IVR investments can hand off calls into Contact Center for representative routing, recording, and analytics, rather than requiring an immediate full migration to Copilot Studio voice agents.

NEW QUESTION: 24

Hotspot Question

A company uses Dynamics 365 Customer Service. The company plans to use internal knowledge sources.

The company must be able to improve case management as follows:

- Automatically draft new knowledge articles for approval by knowledge managers.

- Improve accuracy of recommended articles for resolutions.

You need to configure case management to meet the requirements.

Which actions should you perform? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Customer Knowledge Management Agent configuration

Requirement

Automatically draft new knowledge articles.

Action

Enable Copilot conversation summaries.

Configure knowledge analytics dashboards.

Enable the Customer Knowledge Management Agent.

Requirement

Improve accuracy of recommended articles.

Action

Configure knowledge sources.

Configure Copilot knowledge plugins.

Configure knowledge article categories.

Configure the Customer Knowledge Management Agent.

Answer:

Customer Knowledge Management Agent configuration

Requirement

Automatically draft new knowledge articles.

Action

Enable Copilot conversation summaries.

Configure knowledge analytics dashboards.

Enable the Customer Knowledge Management Agent.

Requirement

Improve accuracy of recommended articles.

Action

Configure knowledge sources.

Configure Copilot knowledge plugins.

Configure knowledge article categories.

Configure the Customer Knowledge Management Agent.

Explanation:

Box 1: Enable the Customer Knowledge Management Agent

To automatically draft new knowledge articles from resolved cases in Dynamics 365 Customer Service, you need to configure the Customer Knowledge Management Agent via Copilot capabilities.

-> Enable the Customer Knowledge Management Agent

1. Open the Copilot Service admin center (or Customer Service admin center).
2. Go to Knowledge in the navigation menu.
3. Select Customer Management Agent settings.
4. Check the box to enable real-time knowledge creation from current cases so the system automatically analyzes case notes, emails, and conversations upon closure.

Box 2: Configure knowledge source.

To meet the requirements of using only internal knowledge sources, you should perform the following configurations in the Customer Service admin center (or Copilot Service admin center):

Enforce Internal Knowledge Bases Only

1. Go to Productivity > Copilot for questions and emails (or Knowledge settings).
2. Under Knowledge sources, restrict the configuration to use Dynamics 365 Knowledge Base (Dataverse) only.
3. Ensure that any external search providers (such as public websites or untrusted third-party repositories) are disabled or excluded to satisfy the internal-only requirement Reference:

<https://learn.microsoft.com/en-us/dynamics365/release-plan/2025wave1/service/dynamics365-contact-center/use-customer-knowledge-management-agent-update-knowledge-base>

<https://learn.microsoft.com/en-us/dynamics365/customer-service/administer/set-up-knowledge-management-embedded-knowledge-search>

NEW QUESTION: 25

A company wants customers to start a conversation on the website, and if no representative responds within a set time, the chat should automatically offer a bot-assisted path instead of a busy signal.

You need to configure this behavior.

What should you do?

- A. Configure a pre-chat survey.
- B. Configure proactive chat rules.
- C. Configure overflow and fallback handling for the chat workstream.
- D. Enable quick replies.

Answer: (SHOW ANSWER)

Overflow and fallback settings on a workstream/queue define what happens when a conversation cannot be routed within acceptable wait times or capacity - such as rerouting to a bot, a different queue, or a fallback message. Pre-chat surveys collect information before a conversation starts, proactive chat invites customers to start a chat, and quick replies are predefined agent responses

- none of these address capacity-based failover.

NEW QUESTION: 26

Case Study 2 - VanArsdel, Ltd

Background

VanArsdel, Ltd. is a global company that provides outsourced customer support services for enterprise clients across multiple industries, including retail, healthcare, and financial services.

VanArsdel, Ltd. is implementing Microsoft Dynamics 365 Contact Center to modernize its contact center operations. The company aims to provide a unified omnichannel experience for customers and improve customer service representative (CSR) productivity through AI-driven tools and automation.

The implementation will support voice, chat, and digital messaging channels. The initial rollout focuses on voice capabilities and AI-assisted CSR experiences. The solution must be scalable and configurable using out-of-the-box functionality where possible.

The company employs approximately 500 CSRs, 50 supervisors, and a small team of system administrators responsible for configuration and maintenance. Some back-office CSRs are available for consultations with frontline CSRs.

VanArsdel, Ltd. currently operates multiple outdated CCaaS platforms across its divisions. The company is concerned about CSR adoption and therefore plans to adopt a phased approach. The company plans to use its existing CCaaS solution with Copilot Service workspace to enable adoption of the agent desktop while the voice channel and associated capabilities are developed.

Current environment

Contact Center channels

VanArsdel, Ltd. currently uses an outdated telephony system integrated with a third-party CRM.

The system lacks support for modern APIs and does not provide advanced analytics or AI capabilities.

The company plans to replace the outdated system with Dynamics 365 Contact Center and Microsoft Teams Phone functionality.

Outbound communication capabilities are limited in the current system to SMS only and must be enhanced to support proactive engagement campaigns. A third-party tool is used to manage current campaigns.

CSR experience

CSRs currently rely on multiple disconnected systems to manage customer interactions. This results in inefficiencies and increased handling times.

The new solution must provide a unified interface with embedded productivity tools, including:

- AI-powered suggestions during live interactions.
- Suggested responses based on the CSR's interaction with the agent desktop and the conversation context.
- Real-time transcription and sentiment analysis.
- Integration with company-owned knowledge bases.

CSRs must be able to interact with customers through voice and digital channels within a single workspace. The sales director requires CSRs to be able to collect orders from their third-party order management tool from the Productivity panel. CSRs must be prevented from accessing payment information.

Data protection and compliance

VanArsdel, Ltd. handles sensitive customer data, including personally identifiable information (PII) and payment details.

The company must comply with strict data protection regulations, including:

- Masking sensitive data during live interactions.
- Preventing National Identity and payment card information from being stored in transcripts and AI generated summaries.
- Ensuring secure handling of customer information across all channels.

The current system does NOT provide adequate data masking capabilities.

Integration requirements

The company uses several internal systems, including:

- A customer account management system.
- A billing platform.
- A knowledge management system.

These systems must be integrated with Dynamics 365 Contact Center to provide CSRs with relevant information during interactions.

The company also has a third-party marketing platform. However, the company currently does NOT plan to integrate the platform and instead is evaluating Customer Insights - Journeys.

Business requirements

Voice channel implementation

VanArsdel, Ltd. must implement a voice channel that meets the following requirements:

- Support inbound and outbound voice calls by using Microsoft Teams Phone.
- Enhance call controls by using SDK APIs.
- Allow supervisors to monitor and manage live calls.
- Provide real-time insights into call performance.

The solution must support scalability to handle peak call volumes during seasonal demand.

Proactive engagement

The company must implement proactive outbound engagement capabilities, including:

- Proactive Dialer to adjust call pacing based on CSR availability and answer rates.
- Trigger-based engagement based on customer actions.
- Integration with customer data to personalize outreach.

Outbound campaigns must be configurable without requiring custom code.

Agent assist and AI capabilities

VanArsdel, Ltd. must enhance CSR productivity by implementing AI-powered assistance features, including:

- Suggested responses during customer interactions.
- Automated knowledge article recommendations.
- Real-time transcription and summarization.
- Real-time assistance sent to the CSR in the send message box during chat conversations.

The company also plans to extend Copilot capabilities by integrating custom plugins, tools, and connectors.

Additionally, a bot must be implemented to support CSRs by providing interactable contextual guidance during interactions.

Voice agent configuration

The company must configure voice agents to support natural and efficient customer interactions.

- The solution must include:
- Real-time speech recognition.
- Accurate transcription of customer conversations.
- Configurable voice settings to optimize performance.

Voice agents must follow best practices to ensure high-quality interactions and minimize errors.

Technical requirements

Channel Integration Framework

VanArsdel, Ltd. requires a phased approach to deploying the voice channel. The company plans to use its existing CCaaS solution with Copilot Service workspace to enable adoption of the agent desktop while the voice channel and associated capabilities are developed. The company requires the Channel Integration Framework to be built to:

- Click-to-act functionality for outbound communication.
- Integration with third-party applications.
- A consistent user experience for CSRs.

Sensitive data masking

The solution must include sensitive data masking capabilities that:

- Automatically detect and mask sensitive information during interactions.
- Prevent exposure of sensitive data in logs and transcripts.
- Allow administrators to configure masking rules.

Omnichannel JavaScript API

Custom extensions must be developed by using the Omnichannel JavaScript API to:

- Provide enhanced automation during a conversation.
- Display conversation dynamically based on the defined business process.
- Provide contextual information during customer interactions.

These extensions must be maintainable and align with best practices.

Supervisor experience

Supervisors must have access to advanced analytics and monitoring tools, including:

- Real-time dashboards for intraday CSR performance.
- Historical insights into call volumes and trends.
- Tools to manage and optimize CSR workloads.

The supervisor app must be used to provide actionable insights that improve operational efficiency.

Issues

VanArsdel, Ltd. has identified the following issues in the current environment:

- CSRs experience delays due to switching between multiple systems.
- Sensitive customer data is exposed during interactions.
- Outbound engagement capabilities are limited and not automated.
- Supervisors lack visibility into real-time performance metrics.
- Voice interactions lack transcription and AI-assisted features.

Problem statement

VanArsdel, Ltd. must implement a modern contact center solution by using Dynamics 365 Contact Center to:

- Improve CSR productivity through AI and automation.
- Ensure compliance with data protection regulations.
- Enhance customer engagement through proactive outreach.
- Provide a unified and efficient CSR experience.
- Enable supervisors to monitor and optimize operations effectively.

The solution must be scalable, secure, and aligned with best practices for configuring channels, AI capabilities, and integrations.

Drag and Drop Question

You need to configure the Dynamics 365 Contact Center solution based on the data protection and compliance requirements.

Which configurations should you apply? To answer, move the appropriate configurations to the correct contexts. You may use each configuration once, more than once, or not at all. You may need to move the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

Configurations

Enable field-level security.

Enable sensitive data redaction.

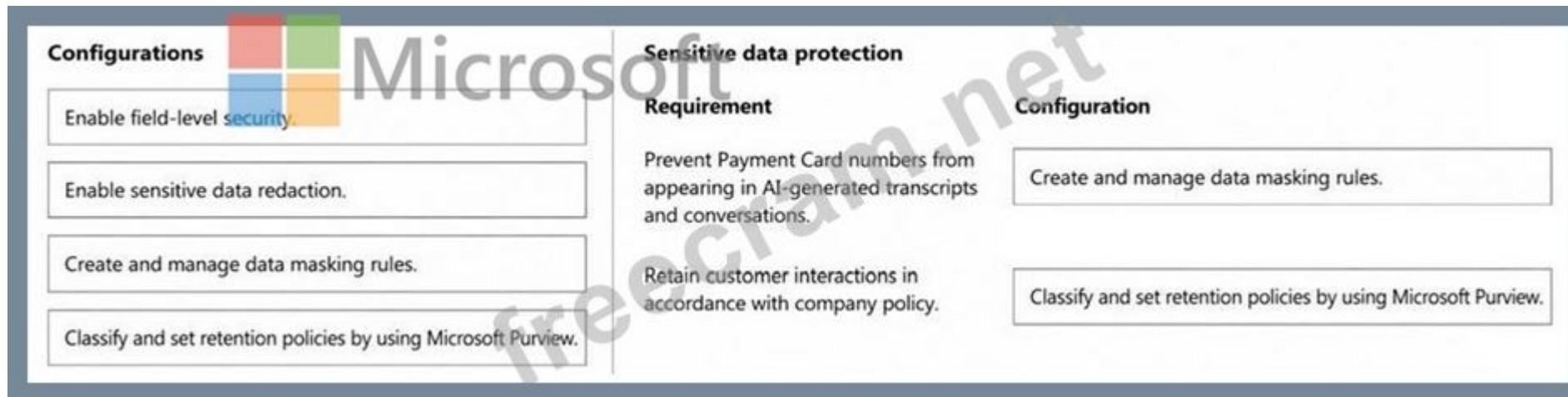
Create and manage data masking rules.

Classify and set retention policies by using Microsoft Purview.

Sensitive data protection

Requirement	Configuration
Prevent Payment Card numbers from appearing in AI-generated transcripts and conversations.	
Retain customer interactions in accordance with company policy.	

Answer:



Explanation:

Box 1: Create and manage data masking rules

You should create and manage data masking rules to prevent payment card numbers (credit/debit cards) from appearing in conversations and AI-generated transcripts.

In Dynamics 365 Contact Center and Dynamics 365 Customer Service, you configure data masking by defining regular expressions (regex) that identify sensitive data patterns. Once a masking rule is activated, any identified text in a live interaction is replaced with masked characters (such as # or *), and this obfuscation automatically applies to the stored conversation transcripts.

Key Details About Masking Rules

Out-of-the-Box Rules: Dynamics 365 includes a pre-built, inactive rule for Credit Cards that you can quickly turn on.

Rule Scope: You can choose to mask data sent by the customer, the agent, or both.

System Limit: You can configure and run up to 10 active masking rules simultaneously.

Box 2: Classify and set retention policies by using Microsoft Purview

To retain customer interactions in accordance with company policy, the best action is to Classify and set retention policies by using Microsoft Purview.

Microsoft Purview is the dedicated compliance and governance framework designed specifically to manage data lifecycle requirements (such as retaining or deleting content) across the entire Microsoft ecosystem, including customer interaction records, transcriptions, and AI/Copilot interactions.

Reference:

<https://d365goddess.com/enhance-data-protection-in-dataverse-with-secured-masking-rules>

<https://learn.microsoft.com/en-us/purview/ai-microsoft-purview>

NEW QUESTION: 27

A company plans to support messaging across multiple digital platforms.

The company requires messages from external platforms to be processed and assigned to appropriate customer service representatives (CSRs).

You need to enable digital channels.

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

NOTE: Each correct selection is worth one point.

- A.** Configure routing rules for incoming conversation
- B.** Configure asynchronous messaging policies
- C.** Configure session templates for CSRs
- D.** Define workstreams mapped to each digital channel
- E.** Configure connectors for each digital channel

Answer: (SHOW ANSWER)

To successfully ingest and route external messages to your customer service representatives (CSRs), you must execute these steps sequentially using the Copilot Service admin center or Omnichannel Admin Center.

[E]

1. Configure Connectors for Each Digital Channel

Before routing can occur, you must bridge Dynamics 365 with your external messaging providers.

Native & Social Channels: Navigate to Channels within your administration hub to provision native tools like Live Chat widgets, or hook up third-party platforms via social connectors (such as WhatsApp or Facebook).

SMS Integration: Configure telephony providers like Azure Communication Services, Twilio, or Infobip by syncing your numbers and configuring necessary event grids to let messages flow into the system.

[D]

2. Define Workstreams Mapped to Each Digital Channel

A workstream acts as the primary container that ingests, enriches, and structures your incoming customer interactions.

Create a New Workstream for each communication medium (e.g., a messaging workstream for Chat, and another for SMS).

Define the Work Distribution Mode. Choose Push to automatically offer the interaction to available CSRs based on capacity, or Pick to allow representatives to manually claim interactions from an open queue.

[A]

3. Configure Routing Rules for Incoming Conversations

Routing rules ensure that the ingested message lands in front of the agent best equipped to handle it.

Route-to-Queue Rules: Construct conditions that evaluate these classification properties. For example, route a WhatsApp billing question directly to a "Billing Queue" populated by CSRs who possess the required skills and matching capacity.

Reference:

<https://dynamicservicesgroup.com/2025/06/24/setting-up-omnichannel-in-dynamics-365-a-step-by-step-guide/>

NEW QUESTION: 28

A company plans to introduce an autonomous AI agent that identifies customer intent to customer service representatives in phases.

The rollout must be controlled and support phased adoption based on business readiness. The rollout must NOT enable the agent for all workloads at the same time.

You need to implement the rollout.

What are two actions you can perform? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

- A. Create rollout plans with defined phases in Agent hub.
- B. Publish the app to all agents and track adoption metrics.
- C. Rework routing rules between rollout phases.
- D. Assign the rollout to a single wave and monitor the result.
- E. Segment the agent into staged deployments by using lines of business.

Answer: (SHOW ANSWER)

To implement a phased rollout of autonomous agents like the Customer Intent Agent within Dynamics 365 Contact Center, you use the built-in Rollout manager.

Here is exactly how the process functions to achieve a staged deployment:

[A]

Rollout Plans: You navigate to Agent hub via the Copilot Service admin center. From there, you can build phased rollout plans to manage adoption gradually across your organization.

[E]

Lines of Business (LOB): To segment the deployment and avoid a global release, you partition the agent's scope using Lines of Business. This enables you to target the AI agent's intent discovery features to specific departments, case conditions, or operational units first, rather than applying them to all workloads simultaneously.

Reference:

<https://learn.microsoft.com/en-us/dynamics365/contact-center/administer/create-rollout-plans>

NEW QUESTION: 29

Drag and Drop Question

A company supports multiple communication channels. Customer service representatives (CSRs) handle multiple work items concurrently based on configured workload limits.

The company must be able to control how CSRs handle workload across channels.

The solution must:

- Limit how much work a CSR can handle at the same time.
- Prevent CSRs from receiving new work items until their conversations are closed.

You need to configure workload management for the CSRs.

How should you configure the workloads? To answer, move the appropriate configurations to the correct requirements. You may use each configuration once, more than once, or not at all. You may need to move the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

Configurations	Agent workload management
Assign a capacity profile to the CSR.	Requirement
Map the CSR role to a different persona.	Define concurrent workload limit.
Increase the queue priority for the channel.	Prevent new work until conversations are closed.
Block capacity for wrap-up in the workstream.	
	Configuration

Answer:

Configurations	Agent workload management
Assign a capacity profile to the CSR.	Requirement
Map the CSR role to a different persona.	Define concurrent workload limit.
Increase the queue priority for the channel.	Prevent new work until conversations are closed.
Block capacity for wrap-up in the workstream.	
	Configuration
	Assign a capacity profile to the CSR.
	Block capacity for wrap-up in the workstream.

Explanation:

Box 1: Assign a capacity profile to the CSR

To limit how much work a customer service representative (CSR) can handle at the same time in a Dynamics 365 Contact Center environment, you should use Capacity Profiles.

Capacity Profiles provide the precise mechanism needed to control concurrent workloads across multiple communication channels:

Define Workload Quantities: You can create custom profiles that specify the exact amount of work, concurrent capacity limits, or daily limits for various types of interactions.

Cross-Channel Control: Administrators can configure profiles to block the assignment of new work items on certain digital channels when a CSR is busy handling a high-priority channel, such as an active phone call.

Multiple Profile Assignment: You can assign multiple different capacity profiles to an individual user, giving the system the flexibility to balance complex multi-channel workloads natively

Box 2: Block capacity for wrap up in the workstream To meet this requirement, you should configure the Block capacity for wrap up setting to Always block within the work distribution settings of the relevant workstream.

Configuration Details

Where to set it: Navigate to the Workstreams area within the admin center, select the appropriate channel's workstream, and go to the Work distribution section.

How it works:

By default, when a CSR or customer ends an active interaction, the conversation transitions into an intermediate Wrap-up state (allowing the agent to write notes or log outcomes).

Setting this option to Always block ensures that the agent's configured capacity continues to be fully consumed throughout the wrap-up period.

The system will not route any new work items to the CSR until they (or the system's auto-close scheduler) explicitly change the conversation's state to Closed, freeing up their capacity.

Reference:

<https://learn.microsoft.com/en-us/dynamics365/customer-service/administer/capacity-profiles>

<https://learn.microsoft.com/en-us/dynamics365/customer-service/administer/create-workstreams>

NEW QUESTION: 30

A company synchronizes users from Microsoft Entra ID to the Dynamics 365 Contact Center environment.

Some users who have Microsoft Entra IDs cannot access Contact Center features.

You need to enable access for the users with the right permissions needed for Contact Center.

What should you do?

- A.** Assign a security role to the user's team and restrict access using field-level security.
- B.** Assign a security role directly to the user.
- C.** Assign multiple security roles to ensure coverage of required privileges.
- D.** Add the user to a team that has a security role assigned.

Answer: (SHOW ANSWER)

The best action to address the problem is to add the user to a team that has a security role assigned.

In Microsoft Dynamics 365, managing security roles through team membership is the best-practice approach for scalability and administrative efficiency. Instead of manually managing individual user records—which is error-prone and time-consuming—assigning security roles to Microsoft Entra ID security teams (Group teams) allows users to automatically inherit the required Contact Center permissions as soon as they are synchronized and added to the corresponding Entra ID group.

Automated Provisioning: When users are added to the Microsoft Entra ID group, they automatically join the linked Dynamics 365 team and inherit its roles.

Low Administrative Overhead: You manage group memberships in one central location (Entra ID) rather than updating individual user profiles across multiple environments.

Security Compliance: It ensures consistent privilege assignment across entire departments or job functions.

Reference:

<https://learn.microsoft.com/en-us/entra/identity/hybrid/connect/tshoot-connect-sync-errors>

NEW QUESTION: 31

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear on the review screen.

A company has a custom portal.

The company requires secure customer identity validation before a chat begins.

You need to ensure secure authentication.

Solution: Configure chat authentication by using Microsoft Entra ID.

Does the solution meet the goal?

A. Yes

B. No

Answer: ([SHOW ANSWER](#))

Correct:

* Pass a signed token from an external identity provider during chat initialization Passing a signed JSON Web Token (JWT) from an external identity provider during chat initialization is the correct approach to secure customer identity validation in Dynamics 365 Contact Center.

Token Creation: Your external identity provider generates a signed JWT when the user logs into your custom portal.

Public Key URL: You configure an authentication setting in Dynamics 365 with your public key URL so the system can verify the token's signature Client-Side Function:

A JavaScript client function retrieves the token on widget load.

Initialization: The chat widget uses the token during startup to pass context and establish an authenticated user session instead of an anonymous one.

Incorrect:

* Allow anonymous chat sessions

* Configure chat authentication by using Microsoft Entra ID.

* Use pre-chat survey responses combined with session variables to infer user identity.

Reference:

<https://community.dynamics.com/forums/thread/details/?threadid=71c0f82e-0ff1-ee11-904c-6045bda7c23b>

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NEW QUESTION: 32

Hotspot Question

A company uses Dynamics 365 Customer Service with Workforce management and shift-based routing enabled.

Customer service representatives (CSRs) at the company must receive work only during scheduled working hours. They must NOT receive work during breaks within a shift.

You need to configure routing eligibility.

How should you complete each configuration? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Routing eligibility configuration

Requirement

Assign work only during scheduled working hours.

Prevent work assignment during breaks within a shift.

Configuration

Add shift bookings for CSRs.

Assign activity types to CSR shifts.

Check whether the CSR meets channel assignment rules.

Set routing rules for channel priority.

Set staffing rules for forecast intervals.

Set activity types to control availability during a shift.

Answer:

Routing eligibility configuration

Requirement

Assign work only during scheduled working hours.

Prevent work assignment during breaks within a shift.

Configuration

Add shift bookings for CSRs.

Assign activity types to CSR shifts.

Check whether the CSR meets channel assignment rules.

Set routing rules for channel priority.

Set staffing rules for forecast intervals.

Set activity types to control availability during a shift.

Explanation:

Box 1: Add shift bookings for the CSRs

To ensure customer service representatives (CSRs) only receive work during scheduled working hours, you must create and assign shift bookings marked with a "working" activity type within the Workforce Management app or via an external adapter.

How Shift Bookings Control Routing

Working status: Unified routing checks if a representative has an active "working" type shift booking before assigning records or conversations.

Automatic exclusion: The system automatically blocks assignments during non-working periods, breaks, and training sessions without requiring manual presence updates.

Box 2: Set activity types to control availability during a shift

To prevent customer service representatives (CSRs) from receiving work during breaks, you should set activity types to control availability during a shift.

Activity Types: In Dynamics 365 Workforce Management, you define specific activities (like breaks, lunch, or training). You can configure these activity types with an Availability status set to

"Unavailable" or "Break". When a CSR is on an assigned break, the routing engine recognizes their status and automatically stops routing new work items to them.

Incorrect:

Staffing Rules: These rules are used to calculate the required headcount for forecast intervals based on service level targets. They help you determine how many people you need, but they do not directly control real-time routing or individual agent availability during a shift.

Reference:

<https://learn.microsoft.com/en-us/dynamics365/customer-service/administer/configure-routing-on-agent-calendar>

NEW QUESTION: 33

A contact center wants to forecast staffing needs for the next quarter based on historical contact volume and handle time, then generate shift schedules automatically.

You need to identify the capability set to configure.

What should you use?

A. Workforce management (WFM), including forecasting and shift scheduling

B. Agent hub rollout plans

C. Quality Evaluation agent

D. Capacity profiles only

Answer: (SHOW ANSWER)

Workforce management (WFM) capabilities in Dynamics 365 Contact Center include demand forecasting based on historical patterns and shift/schedule generation and management, either natively or via third-party WFM integration. Capacity profiles limit concurrent work per representative but don't forecast demand or build schedules; Agent hub rollout plans manage phased AI agent deployment, not staffing.

NEW QUESTION: 34

Hotspot Question

A company uses Dynamics 365 Contact Center.

The company must be able to redirect work items when they reach a maximum wait time of 30 seconds.

You need to configure Contact Center queues to meet the requirements.

What should you configure for each requirement? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Queue overflow configuration

Requirement	Configuration
Trigger an action when wait time exceeds 30 seconds.	Routing rules Overflow threshold Assignment method
Redirect work to another queue.	Fallback queue Queue transfer Queue prioritization

Answer:

Queue overflow configuration

Requirement	Configuration
Trigger an action when wait time exceeds 30 seconds.	▼ Routing rules Overflow threshold Assignment method
Redirect work to another queue.	▼ Fallback queue Queue transfer Queue prioritization

Microsoft

Explanation:

Box 1: Overflow threshold

To trigger an action when a wait time reaches 30 seconds in Dynamics 365 Contact Center, you should use an overflow threshold (specifically configured under Overflow handling within the queue settings).

Overflow Handling: This feature allows you to define explicit condition-action pairs. By selecting the Waiting time in queue exceeds condition and setting it to 30 seconds, you can directly trigger an action-such as transferring the customer to another queue, routing to voicemail, or offering a direct callback.

Box 2: Queue transfer

You should use a queue transfer (or route/transfer to queue) to redirect active conversations or work items to a different queue in Dynamics 365 Contact Center.

Transfer to Queue: Move an active conversation to a specialized queue when a request needs deeper expertise or better workload balancing.

Overflow Handling: Automatically redirect queries to another queue when wait times or work item limits are exceeded.

Route Action: Change the queue or assign the item to a specific user if an item was sent to the wrong place initially.

Reference:

<https://learn.microsoft.com/en-us/dynamics365/customer-service/administer/manage-overflow>

<https://www.microsoft.com/en-us/dynamics-365/blog/it-professional/2026/03/25/dynamics-365-contact-center-transfer-capabilities/>

NEW QUESTION: 35

Hotspot Question

A company is implementing Dynamics 365 Contact Center to support Service team 1 and Service team 2.

Service team 1 handles general inquiries. Service team 2 handles complex product issues.

Each team must receive only its own work items.

Service team 1 must be able to handle unidentified work items.

You need to configure the Contact Center environment to meet the requirements.

Which action should you perform for each requirement? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Requirement	Action
Separate work by team.	▼ Create a queue per team. Configure overflow rules. Configure experience profiles per team member.
Service team 1 handles unidentified work items.	▼ Configure fallback queue. Configure queue prioritization. Assign skills to customer service representatives.

Answer:

Queue configuration

Requirement

Separate work by team.

Action

▼

Create a queue per team.

Configure overflow rules.

Configure experience profiles per team member.

Service team 1 handles unidentified work items.

▼

Configure fallback queue.

Configure queue prioritization.

Assign skills to customer service representatives.

Explanation:

Box 1: Create a queue per team

You should create a separate queue for each team.

In Dynamics 365 Contact Center, using a one-queue-per-team model is the best practice for this scenario to ensure strict routing isolation and clear operational boundaries.

Work Isolation: It ensures Team 1 agents only see general inquiries and Team 2 agents only see complex product issues in their respective dashboards.

Targeted Assignment: You can easily link each queue to a specific routing rule set that evaluates incoming conversations (e.g., based on IVR selection, skill tags, or incoming email address) and sends them to the correct queue.

Distinct Membership: You can assign Team 1 users to the Team 1 queue and Team 2 users to the Team 2 queue, preventing agents from accidentally picking up work outside their expertise.

Cleaner Reporting: It allows managers to track historical analytics, service level agreements (SLAs), and handle times for Team 1 and Team 2 independently.

Box 2: Configure fallback queue

You should set up a fallback queue, and it should be mapped to Team 1.

In Dynamics 365 Contact Center unified routing, a workstream-level fallback queue acts as a safety net.

Configure the Fallback Queue:

1. Set Team 1, or a dedicated queue containing Team 1 agents, as the fallback queue for the workstream
2. .Configure Route-to-Queue Rules: Write specific routing rules that identify complex issues and send them to T2.
3. Handling Unidentified Items: Any incoming work item that does not match the complex product criteria-or fails to match any routing rules-will automatically route to the fallback queue (Team 1).

Reference:
<https://learn.microsoft.com/en-us/dynamics365/customer-service/administer/set-up-queues-manage-activities-cases>
<https://learn.microsoft.com/en-us/dynamics365/customer-service/administer/queues-omnichannel>

NEW QUESTION: 36

Hotspot Question

A company uses persistent chat and messaging channels in a contact center. The company requires tighter conversation lifecycle control to keep queues clean and customer service representative workloads current. The company has the following requirements:

- Conversations that remain in a waiting status without customer engagement must automatically close after a defined period.
- Chat conversations that move to wrap-up must automatically close after a business-defined custom time limit.

You need to configure the channels to meet the requirements. Which action should you perform for each requirement? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Configure conversation lifecycle controls

Requirement	Action
Close conversations after non-engagement in waiting state.	▼ Configure channel state. Configure conversation wrap-up settings. Configure auto-close after inactivity in the workstream.
Change auto-close duration for wrap-up state.	▼ Configure conversation state transitions. Configure channel state by using the web API. Configure auto-close after inactivity in the workstream.

Answer:

Configure conversation lifecycle controls

Requirement

Close conversations after non-engagement in waiting state.

Action

▼

Configure channel state.

Configure conversation wrap-up settings.

Configure auto-close after inactivity in the workstream.

Change auto-close duration for wrap-up state.

▼

Configure conversation state transitions.

Configure channel state by using the web API.

Configure auto-close after inactivity in the workstream.

Explanation:

Box 1: Configure auto-close after inactivity in the workstream

To automatically close inactive conversations and keep your queues clean in a Dynamics 365 Contact Center environment, you need to configure Timeout rules within the workspace workstreams. This feature evaluates customer inactivity and shifts conversations from an open or waiting state directly to closed, freeing up your representative's capacity.

Configuration Steps:

1. In your contact center admin center, open the specific workstream you want to configure.
2. Locate the Work distribution area within the workstream settings.
3. Select See more to expand the hidden or additional distribution properties.
4. Locate the Auto-close after inactivity setting and choose or enter the desired time period (e.g., 5 minutes). Once a conversation remains in a Waiting state without activity past this threshold, it will automatically move to the Closed state.

Box 2: Configure channel state by using the web API

To automatically close chat conversations that have moved into the wrap-up state after a business-defined custom time limit, you must configure channel state by using the web API.

In Dynamics 365 Contact Center / Customer Service, the default time for automatically closing a live chat in the Wrap-up state is 15 minutes. This duration is managed globally by the msdyn_autocloseliveworkitemafter attribute found within the msdyn_occhannelstateconfigurations entity.

To override this default and establish a custom business time limit for the wrap-up state specifically, administrators must execute a PATCH request against this entity record using the Web API.

Reference:

<https://learn.microsoft.com/en-us/dynamics365/customer-service/administer/auto-close-conversation-powerapps>

NEW QUESTION: 37

Hotspot Question

You are configuring inbound and outbound calling behavior for voice interactions.

Inbound calls must follow the appropriate handling configuration. Outbound calls must display the specified caller ID when a customer service representative (CSR) places the call.

You need to perform the necessary task for each requirement.

What task should you perform to meet each requirement? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Configure inbound and outbound calling profiles

Requirement

Inbound calls use the appropriate handling configuration.

Assignment

- Assign the queue to the inbound profile
- Assign the inbound profile to the phone number
- Assign the inbound profile to the CSR profile
- Assign the workstream to the inbound profile

Outbound calls display the specified caller ID.

- Assign the queue to the outbound profile
- Assign the workstream to the outbound profile
- Assign the outbound profile to the phone number
- Assign the outbound profile to the capacity profile

Answer:

Configure inbound and outbound calling profiles

Requirement	Assignment
Inbound calls use the appropriate handling configuration.	▼ - Assign the queue to the inbound profile - Assign the inbound profile to the phone number - Assign the inbound profile to the CSR profile - Assign the workstream to the inbound profile
Outbound calls display the specified caller ID.	▼ - Assign the queue to the outbound profile - Assign the workstream to the outbound profile - Assign the outbound profile to the phone number - Assign the outbound profile to the capacity profile

Explanation:

Box 1: Assign the inbound profile to the phone number

To configure direct inbound calls to follow a specific handling configuration in Dynamics 365 Contact Center, you assign the inbound profile to the phone number (or user/representative for direct inward dialing).

Box 2: Assign the queue to the outbound profile.

Outbound Calling Configuration

When setting up an outbound profile in Dynamics 365 Contact Center or Customer Service, you configure the caller ID by linking the specific queue and capacity profile.

In the outbound profile settings, you select the Queue from a dropdown list and specify the desired Caller ID number.

This association ensures that when a customer service representative (CSR) assigned to that queue makes an outbound call, the correct specified caller ID is displayed to the customer.

Reference:

<https://learn.microsoft.com/en-us/dynamics365/customer-service/administer/configure-outbound-inbound-profiles>

NEW QUESTION: 38

A company is configuring Copilot in Dynamics 365 Customer Service to assist customer service representative (CSRs) with real-time responses in the sidecar pane. The company has NOT approved Copilot Studio use yet.

The company configures multiple data sources for Copilot to answer questions and generate draft emails and chats.

Copilot must generate responses by using only supported knowledge sources that are enabled in Copilot Service admin center without enabling knowledge sources from Copilot Studio.

You need to configure the knowledge sources that Copilot can use.

What are two knowledge sources you can configure for Copilot to use? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

A. Microsoft SharePoint content connected as a knowledge source

B. Copilot prompt templates

C. Trusted webpages configured as a knowledge source

D. Microsoft Dataverse tables mapped to fields

E. Microsoft Dataverse knowledge articles

Answer: C,E (LEAVE A REPLY)

When Copilot in Dynamics 365 Customer Service is restricted strictly to the native configuration within the Copilot Service admin center (without enabling or routing through Microsoft Copilot Studio), you can configure and use the following supported native knowledge sources:

[E]

Dynamics 365 Internal Knowledge Base: The native knowledge management system within Dynamics 365 Customer Service where your standard internal knowledge articles are created, indexed, and published.

[C]

External Web Search (via Bing): The out-of-the-box web search functionality that utilizes public internet data via Bing to help customer service representatives answer questions, provided it is turned on in your region settings.

Note:

SharePoint, Dataverse files, Enterprise Data, or custom uploaded files-explicitly require turning on the Knowledge Hub / Copilot Studio integration toggle inside the admin center. Since your company has not approved Copilot Studio use, you must leave that option disabled and rely solely on your native Dynamics 365 knowledge articles and Bing web search.

Reference:

<https://learn.microsoft.com/en-us/dynamics365/customer-service/administer/admin-km-agent>

NEW QUESTION: 39

Drag and Drop Question

A company uses Dynamics 365 Contact Center.

Supervisors must be able to perform the following:

- Observe conversations without notifying customers and without interacting.
- Redirect a conversation from one customer service representative (CSR) to another CSR.

You need to configure the supervisor settings to meet the requirements.

You need to configure the minimal security access for each requirement.

What should you configure for each requirement? To answer, move the appropriate configurations to the correct requirements. You may use each configuration once, more than once, or not at all. You may need to move the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

Configurations

Assign

Monitor

Whisper

Transfer

Barge in

Manage conversations

Requirement

Observe conversations.

Redirect conversations.

Microsoft

Configuration

Answer:



Explanation:

Box 1: Monitor

To meet this requirement with the minimal security access, you should use the Monitor configuration.

Monitor allows a supervisor to join a live conversation silently. The customer is not notified, and the supervisor cannot interact with either party. This perfectly matches your requirements while adhering to the principle of least privilege.

Box 2: Transfer

To meet the requirement of redirecting a conversation from one Customer Service Representative (CSR) to another while maintaining minimal security access, you should use the Transfer configuration.

Transfer: By default, Dynamics 365 Contact Center allows CSRs to directly transfer a conversation to another queue or representative without needing specialized supervisor permissions. Enabling Direct Transfer allows a regular agent to choose another agent directly, resolving the issue efficiently Reference:

<https://learn.microsoft.com/en-us/dynamics365/customer-service/administer/enable-monitor-assign-transfer-conv>

NEW QUESTION: 40

Drag and Drop Question

A company uses Workforce management forecasting.

The company requires forecast staffing based on historical interaction data.

You need to configure a forecast scenario.

Which four 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

Review forecast results.
Set forecast parameters.
Create a forecast scenario.
Select comparison data for scenario validation.
Run the forecast.

Answer Area

Answer:

Actions

Review forecast results.
Set forecast parameters.
Create a forecast scenario.
Select comparison data for scenario validation.
Run the forecast.

Answer Area

Create a forecast scenario.
Set forecast parameters.
Run the forecast.
Review forecast results.

Explanation:

Step 1: Create a forecast scenario

You first initialize the scenario configuration and apply your parameters (such as the specific historical channels, date ranges, and granularity).

Step 2: Set forecast parameters

Step 3: Run the forecast

You must execute (run) the calculation engine before you can look at and analyze the final staffing predictions.

Step 4: Review forecast results

Incorrect:

Validation Skip: Select comparison data for scenario validation is typically a part of adjusting advanced validation settings or comparing manual tweaks, but it is not one of the four core sequential steps required to generate and complete a standard historical baseline forecast run.

Reference:

<https://learn.microsoft.com/en-us/dynamics365/contact-center/use/workforce-management-forecast-scenarios>

NEW QUESTION: 41

Representatives want an automatically generated summary of a long conversation once it ends, to speed up wrap-up and case notes.

You need to enable this capability.

What should you configure?

- A.** Copilot summaries
- B.** The Ask a question feature
- C.** A smart assist bot
- D.** Prompt plugins only

Answer: ([SHOW ANSWER](#))

Copilot summaries automatically generate a condensed summary of a conversation for the representative, reducing manual wrap-up time. "Ask a question" lets representatives query knowledge sources conversationally during a call/chat, and a smart assist bot proactively surfaces suggestions - both are related but distinct capabilities from automatic conversation summarization.

NEW QUESTION: 42

A company uses a third-party CRM as its primary system.

Customer service representatives must use Dynamics 365 Contact Center features without leaving the CRM system.

You need to set up Contact Center to meet the requirement.

What should you do?

- A.** Configure the Channel Integration Framework
- B.** Configure embedded Contact Center mode
- C.** Synchronize the third-party CCaaS data

Answer: B ([LEAVE A REPLY](#))

To meet the requirement of allowing users to leverage Dynamics 365 Contact Center functionalities without leaving a third-party CRM system, you must configure the platform to run in Embedded mode.

Required steps:

1. Retrieve the Embedded Widget URL:
2. Embed the Conversation Widget into the Host CRM:"
3. Establish Data Sync via Connectors

Reference:

<https://github.com/microsoft/dynamics-365-contact-center/blob/main/README.md>

NEW QUESTION: 43

A company is designing AI-powered self-service capabilities through voice agents for a contact center.

The solution must:

- Minimize AI consumption costs.
- Optimize automation coverage.

- Maintain consistent handling of repetitive and unpredictable customer requests.

You need to design the AI capability to meet the requirements.

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.** Implement topic-based responses for repetitive intents and escalate unmatched queries.
- B.** Combine deterministic topic flows with generative fallback for unmatched intents.
- C.** Apply generative AI with grounding for all customer intents and restrict response length.
- D.** Apply generative AI selectively for low-confidence intents identified through classification.
- E.** Route repetitive intents through IVR only and avoid conversational AI.

Answer: ([SHOW ANSWER](#))

[A]

Implementing topic-based responses for repetitive intents and escalating unmatched queries is an appropriate solution because it directly minimizes high-consumption generative AI costs while maintaining predictable and consistent handling for common, repetitive customer requests.

Minimize AI Consumption Costs: Using deterministic, topic-based structures for predictable queries avoids expensive, continuous token consumption from open-ended generative AI models on every single call.

Optimize Automation Coverage: It automates high-volume, repetitive interactions efficiently without wasting system resources on complex generation.

Maintain Consistent Handling: Predefined topic paths guarantee that standard answers (like business hours or order status) are delivered identically every time, while unpredictable queries cleanly route to human agents or secondary support. [

[B]

Combining deterministic topic flows with generative fallback for unmatched intents is a good solution to balance cost, coverage, and consistency in a Dynamics 365 Contact Center environment.

Minimize AI consumption costs: Deterministic logic handles predictable, high-volume repetitive tasks (such as ID verification or basic order lookups) using fixed, low-cost paths instead of expensive generative AI tokens.

Optimize automation coverage: Generative AI acts as a flexible fallback for unpredictable or unique requests that fall outside rigid rule-based menus, expanding the topics the voice agent can handle.

Maintain consistent handling: Repetitive processes follow strict, tested compliance flows, while unpredictable queries still receive natural, context-aware responses.

Incorrect:

[Not D] Apply generative AI selectively for low-confidence intents identified through classification.

Does not optimize automation coverage. If an intent is completely unmapped or unpredictable, traditional classification models will completely fail to categorize it, bypassing the AI entirely.

[Not E] Route repetitive intents through IVR only and avoid conversational AI Fails to optimize containment or account for the dynamic, multi-intent variations within conversational environments, leading to brittle customer experiences and high agent escalation.

Reference:

<https://www.newdynamicllc.com/microsoft-dynamics-365-contact-center-what-real-time-voice-agents-mean-for-service-operations>

NEW QUESTION: 44

A company is enabling outbound calling in Copilot Service workspace.

After this is set up, some customer service representatives (CSRs) are unable to make outbound calls to customers.

You need to verify the configuration of outbound calls for the CSRs.

Which configuration should you verify first for each CSR?

- A.** inbound profile with transfer to external phone numbers enabled

- B. capacity profile associated with an outbound profile
- C. voice channel with outbound calling enabled
- D. personal phone number for making outbound calls
- E. routing rule for outbound calls

Answer: B (LEAVE A REPLY)

To resolve this issue, you should first check that each affected CSR has been added as a user to the outbound capacity profile.

In Dynamics 365 Customer Service and Contact Center, representatives cannot initiate outbound calls using the dialer in the Copilot Service workspace unless they have been explicitly assigned to the appropriate outbound capacity profile and the accompanying outbound profile.

Reference:

<https://learn.microsoft.com/en-us/dynamics365/customer-service/use/voice-channel-call-customer>

NEW QUESTION: 45

A company plans to improve its customer experience.

The company must be able to collect information from its customers before a conversation starts and pass values to the client application.

You need to configure the chat channels to meet the requirements.

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 macros to populate records.
- B. Configure routing rules.
- C. Use the setContextProvider API.
- D. Configure session templates.
- E. Configure pre-chat questions.

Answer: (SHOW ANSWER)

[C]

To achieve this in Dynamics 365 Contact Center, you should use the setContextProvider API.

Pre-chat data handling: The setContextProvider API is specifically designed to pass custom context and information collected before a chat session starts directly to the conversation context in Dynamics 365.

Passing values: It allows the client-side widget to feed variables (like account numbers, user preferences, or authentication tokens) straight to the agent's workspace.

[E]

Configuring pre-chat questions is exactly how you achieve this in Dynamics 365 Contact Center.

Pre-chat surveys allow you to collect essential customer details-such as account numbers, email addresses, or the reason for the interaction-before a live chat or digital messaging session begins.

Key Capabilities:

Data Transfer: The collected values are automatically securely passed into the Dynamics 365 client application.

Agent Context: The responses populate the agent's active conversation pane, providing immediate context without making the customer repeat themselves.

Automated Routing: You can use these pre-chat answers to feed into unified routing rules, ensuring the conversation lands with the most qualified agent or queue.

Incorrect:

[Not A]

Macros are used after a conversation has already reached an agent. They automate repetitive agent actions within the application-like opening a form or updating a record-but they cannot collect pre-chat info from the customer's portal.

Reference:

<https://learn.microsoft.com/en-us/dynamics365/customer-service/administer/set-up-chat-widget>

<https://learn.microsoft.com/en-us/dynamics365/customer-service/administer/configure-pre-chat-survey>

NEW QUESTION: 46

A company uses Dynamics 365 Contact Center.

Customer service representatives (CSRs) in different departments experience inconsistent session handling while using the system.

The company requires consistent session behavior across all CSRs.

You need to standardize behavior across departments.

What should you assign?

- A. session template
- B. application tab template
- C. capacity profile
- D. experience profile

Answer: ([SHOW ANSWER](#))

To resolve the inconsistent session handling and ensure standard behavior across all departments, you should assign Session Templates.

In Dynamics 365 Contact Center, a Session Template defines the exact runtime experience for a customer service representative (CSR) when a communication request or interaction is accepted.

It dictates uniform rules for:

Anchor Tabs: Determining which specific application page (like an Active Conversation or Case form) opens automatically and cannot be closed by the user.

Additional Application Tabs: Standardizing which productivity tools, forms, or knowledge-based tabs pre-populate when a session begins.

Communication Panel Behavior: Deciding how and where the chat, voice, or digital interaction controls appear alongside the workspace.

Reference:

<https://learn.microsoft.com/en-us/dynamics365/customer-service/administer/session-templates>

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NEW QUESTION: 47

A company plans to deploy a global voice channel for Dynamics 365 Contact Center.

The solution must meet the following requirements:

- Use existing carriers and numbers.
- Use existing Session Border Controllers (SBCs) in each office location.

You need to design the voice architecture to meet the requirements.

What should you do?

- A. Acquire phone numbers from Microsoft and connect to Contact Center.
- B. Deploy Microsoft calling plan numbers and connect to Contact Center.
- C. Connect Contact Center with Operator Connect.

D. Deploy Direct Routing for Contact Center.

Answer: D (LEAVE A REPLY)

You must Deploy Direct Routing for Contact Center (via Azure Communication Services Direct Routing) to use your existing carriers, numbers, and on-premises Session Border Controllers (SBCs).

Steps

1. Connect your SBCs: Link your certified office SBCs to Azure Communication Services (ACS).
2. Port or sync numbers: Port your existing carrier phone numbers into ACS and sync them to your Dynamics 365 Contact Center environment.
3. Configure routing: Set up voice routes and tie the connected channels to your designated workstreams.

Reference:

<https://learn.microsoft.com/en-us/dynamics365/customer-service/administer/voice-channel-bring-your-own-number>

NEW QUESTION: 48

A company wants representatives handling premium customers to see a different set of tabs, apps, and case information than representatives handling standard support, within the same Contact Center app.

You need to recommend a configuration.

What should you do?

- A.** Create separate experience profiles with distinct application tab templates for each representative group.
- B.** Create a single experience profile and rely on security roles alone.
- C.** Configure separate environments for premium and standard support.
- D.** Use notification templates to differentiate the experience.

Answer: (SHOW ANSWER)

Experience profiles let administrators tailor the representative UI - including application tab templates, session templates, and inbox views - per group of representatives. Standing up separate environments is unnecessary overhead, and notification templates only control alert content, not the overall workspace layout.

NEW QUESTION: 49

Hotspot Question

You are configuring a pre-chat survey in a chat channel for customer support sessions.

The chat must:

- Be routed based on a value captured in the pre-chat survey.
- Use the same value in a macro after a customer service representative accepts the conversation.

You need to configure the channel to meet the requirements.

Which action should you perform for each requirement? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Configure a chat workflow

Requirement

Route conversations based on the pre-chat survey value.

Use the session value in a macro.

Action

▼

Add a context variable to the workflow.

Change the data type of the context variable after it is in use.

Configure the workflow to use a macro's value for routing.

▼

Use the context variable in a macro.

Rename the context variable to use it in the macro.

Configure the workflow to use a macro's value for routing.

Answer:

Configure a chat workflow

Requirement

Route conversations based on the pre-chat survey value.

Use the session value in a macro.

Action

▼

Add a context variable to the workflow.

Change the data type of the context variable after it is in use.

Configure the workflow to use a macro's value for routing.

▼

Use the context variable in a macro.

Rename the context variable to use it in the macro.

Configure the workflow to use a macro's value for routing.

Explanation:

Box 1: Add a context variable to the workflow

The correct action to take is to add a context variable to the workflow.

In Dynamics 365 Contact Center (and Customer Service), when you configure a pre-chat survey question, the system automatically creates or maps that question name as a context variable.

These context variables store the customer's answers and are directly used to define unified routing rules to direct the chat to the correct queue.

Box 2: Use a context variable in the macro

To achieve the requirement of using a pre-chat survey response inside a macro after a representative accepts the conversation, the correct action to take is to use a context variable in the macro.

Data Flow: Pre-chat survey answers are automatically captured and stored as context variables in the conversation's workflow context.

Macro Integration: To make this dynamic information available for automation (such as auto-filling forms or triggering specific agent actions), you must reference or pass this context variable into the macro definition as a slug parameter.

Reference:

<https://learn.microsoft.com/en-us/dynamics365/customer-service/administer/manage-context-variables>

<https://github.com/MicrosoftDocs/dynamics-365-customer-engagement/blob/main/ce/customer-service/administer/macros.md>

NEW QUESTION: 50

A global company needs its voice agent to detect the caller's spoken language and respond appropriately across English, Spanish, and French without deploying three separate agents. You need to recommend a configuration. What should you do?

- A. Build three fully separate Copilot Studio voice agents, one per language.
- B. Configure a multilingual voice agent.
- C. Configure real-time translation on chat only.
- D. Configure DTMF menus for language selection instead of automatic detection.

Answer: (SHOW ANSWER)

Copilot Studio voice agents support multilingual configuration, allowing a single agent to detect and respond in multiple languages rather than requiring separate agent builds per language.

Real-time translation applies to text/chat/transcript scenarios rather than being the mechanism for a single agent handling multilingual speech.

NEW QUESTION: 51

A company uses Dynamics 365 Contact Center to support its customer service representatives (CSRs) in handling multiple customer interactions. CSRs work with several entities and forms during each interaction.

CSRs must have the required data available when a new session starts.

You need to configure the Copilot Service workspace.

Which template type should you configure?

- A. email
- B. application tab
- C. notification
- D. message

Answer: B (LEAVE A REPLY)

The best template type for this scenario is the application tab template.

An application tab template in Dynamics 365 Contact Center defines exactly which application pages, custom forms, entities, or third-party web apps automatically open when a customer service representative (CSR) starts a new customer session.

Preloading Contextual Data: By configuring application tab templates and associating them with a session template, you guarantee that required entities (such as case forms, customer accounts, or specific scripts) are instantly preloaded and readily available to the agent without requiring manual navigation.

Anchor & Additional Tabs: Every session requires at least one unclosable "Anchor tab" (such as the Active Conversation or Customer Summary page) and can load multiple additional tabs side by side to support high-productivity, multi-tasking scenarios Reference:

<https://github.com/MicrosoftDocs/dynamics-365-customer-engagement/blob/main/ce/customer-service/administer/application-tab-templates.md>

NEW QUESTION: 52

A company has a quality management program for its contact center to ensure excellence for its customer experience.

The company must be able to review conversations and retain records for compliance in support of the program.

You need to configure the voice interactions to meet the requirements.

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. Configure live sentiment analysis during calls.
- B. Enable transcription with storage retention policies.
- C. Configure real-time translation for voice interactions.
- D. Enable call recording for voice conversations.
- E. Associate conversations with post-call survey automation.

Answer: ([SHOW ANSWER](#))

To meet your quality management and compliance requirements for voice interactions, you need to configure Call Recording and Transcription at the workstream level within your administration center.

1. Enable Recording and Transcription

Open the Copilot Service Admin Center app.

Navigate to the specific Voice Workstream you want to configure.

Locate the Phone Number section and select Edit.

Switch to the Behaviors tab.

Under the Transcription and recording dropdown menu, select Transcription and recording.

2. Configure Compliance and Automation Controls

Within the same Behaviors menu, customize your operational preferences to safeguard compliance.

3. Incorporate Consent-Based Recording (Crucial for Compliance)

Reference:

<https://learn.microsoft.com/en-us/dynamics365/guidance/resources/contact-center-functional-testing-blueprint>

NEW QUESTION: 53

A company uses Dynamics 365 Contact Center to handle customer requests through multiple queues. Customer service representatives (CSRs) are staffed during specific periods of the day only.

Requests submitted outside staffed periods are still being placed into queues and assigned when CSRs become available. This leads to delays and poor customer experience.

You need to ensure that queues process work during defined service periods only.

What should you configure?

- A. Dynamics 365 Customer Service calendar
- B. CSR working hours
- C. Queue operating hours
- D. Channel operating hours

Answer: ([SHOW ANSWER](#))

The correct solution is to configure queue operating hours.

To properly restrict work processing to defined service periods, you need to establish and link operating hours to your queues or routing paths.

Step 1: Create an Operating Hour Record

Step 2: Assign Operating Hours to the Queue or Channel

Reference:

<https://learn.microsoft.com/en-us/dynamics365/customer-service/administer/show-queue>

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