

MB-910: Microsoft Dynamics 365 Fundamentals (CRM) Sample Questions

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Microsoft is exploring the possibility of providing sample questions as an exam preparation resource, and we would like your feedback. While we prefer that you complete the [survey](#) after taking the exam, you may complete it at any time. Thank You!

User Guide

These sample questions are intended to provide an overview of the style, wording, and difficulty of the questions that you are likely to experience on this exam. These questions are **not** the same as what you will see on the exam nor is this document illustrative of the length of the exam or its complexity (e.g., you may see additional question types, multiple case studies, and possibly labs). These questions are **examples** only to provide insight into what to expect on the exam and help you determine if additional preparation is required.

In the first section, you will find the questions without answers so that you can test your knowledge. In the second section, the answer, a rationale, and a URL that will link you to additional information is provided immediately below each question.

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Questions

Question # 1 (Multiple Choice)

A marketing agency wants to create a few lists of contacts and accounts to run a customer journey for their upcoming product launch.

Which two options should the agency use?

- A. Static Marketing List
- B. Static Segment
- C. Dynamic Marketing List
- D. Dynamic Segment

Question # 2 (Multiple Choice)

You are using a Dynamics 365 Marketing application to create and send email campaigns to your customers. You want to create a segment in the Marketing application. You must use a solution that analyzes the data using Artificial Intelligence (AI) and the data collected from various applications.

Which application should you choose?

- A. Customer Voice
- B. Customer Service Insights
- C. Customer Insights
- D. Sales Insights

Question # 3 (Sentence Completion)

Select the answer that correctly completes the sentence.

A customer agrees with a quoted price and wants to place an order with a company. The salesperson wants to create an order for this quote. The quote can only be converted to an order when it is in _____ state.

- A. a draft
- B. an active
- C. a cancelled
- D. a revised

Question # 4 (Multiple Choice)

You are reviewing the sales pipeline with your sales team. You want to know which opportunities have low winning confidence.

Which forecast category defines the confidence level?

- A. Pipeline
- B. Omitted
- C. Lost
- D. Committed

Question # 5 (Matching)

Match the solution on the left to the correct descriptions on the right.

Solution

- A. Dynamics 365 Sales Insights
- B. Dynamics 365 Customer Insights
- C. Dynamics 365 Sales

Descriptions

- _____ 1. Unify customer data across multiple sources to get a single view of a customer.
- _____ 2. Nurture Lead and Opportunities.
- _____ 3. Analyze customer interaction data stored in Dynamics 365 Sales and Microsoft 365.

Question # 6 (Multiple Choice)

A company is using Dynamics 365 Customer Service to manage their cases. The company created an entitlement with a future start date.

What will be the status of the entitlement when you activate it?

- A. Waiting
- B. Active
- C. Draft
- D. Cancelled

Question # 7 (Multiple Choice)

A company wants to track the support provided to its customers using tables. The tables need to include the type of support, the response time, and the channel that the customer used to contact support.

Which three tables should you choose?

- A. Omnichannel Chat Channel
- B. Entitlements
- C. Service Level Agreement
- D. Customer Service Schedule

E. Entitlement Channel

Question # 8 (Matching)

Match the rulesets on the left to the correct descriptions on the right.

Rulesets

- A. Routing Rules
- B. Queue
- C. Automatically record creation and update rules

Descriptions

- _____ 1. Automatically convert a service activity to a case.
- _____ 2. Automatically assign a case to the right agent.
- _____ 3. Categorize cases based on products and agents can access it.

Question # 9 (Sentence Completion)

Select the answer that correctly completes the sentence.

A work order status should be in a _____ status when a field technician starts traveling to a work order location.

- A. Scheduled
- B. In-Progress
- C. Completed
- D. Posted

Question # 10 (Multiple Choice)

Which feature of field service allows you to create questions to ensure that technicians are working in a safe environment and following safety protocols?

- A. Work Order Service Tasks
- B. Work Order Services
- C. Incident Type
- D. Inspections

Question # 11 (Matching)

Match the resource skillsets on the left to the correct descriptions on the right.

Resource Skillsets

- A. Resource Category
- B. Characteristic
- C. Rating Model

Descriptions

- _____ 1. Assembly Repair is an expertise that is needed by a resource to complete the work order.
- _____ 2. Proficient in Inventory Management is a value of the expertise or knowledge.
- _____ 3. Bookable resource's role is electrician.

Question # 12 (Matching)

Match the type of scheduling on the left to the correct descriptions on the right.

Type of scheduling

- A. Schedule Assistant
- B. Resource Scheduling Optimization
- C. Manual Scheduling

Descriptions

- _____ 1. Automatic process to minimize travel time.
- _____ 2. Select requirement to create bookings using schedule board.
- _____ 3. Recommend times and resources for bookings.

Question # 13 (Multiple Choice)

A company is using Dynamics 365 Project Operations to manage sales and construction projects. You create a new project-based lead for a potential construction deal. After a few days, the lead is converted to an opportunity.

Which two records are required when you qualify a project-based lead?

- A. Account
- B. Project
- C. Opportunity
- D. Quote

Question # 14 (Multiple Choice)

A company is using Dynamics 365 Project Operations. A customer requests a change to a recent quote. You need to create a new quote and send the quote with revisions to your customer.

Which status is correct?

- A. Draft
- B. Closed as Lost
- C. Revised
- D. Closed as Won

Question # 15 (Sentence Completion)

Select the answer that correctly completes the sentence.

The _____ allocation method should be used to book a resource for 20 hours over five working days. The resource's available capacity is in a "First-in-first-consumed" order.

- A. Percentage Capacity
- B. Remaining Capacity

- C. Front Load Hours
- D. Evenly Distributed Hours

Question # 16 (Multiple Choice)

A company is using Dynamics 365 Project Operations. A project manager is creating a project schedule in the work breakdown structure and needs to make changes in the scheduling mode for the fixed duration task.

What is the correct impact if you revise the efforts?

- A. Units are recalculated
- B. Effort is recalculated
- C. Duration is recalculated
- D. Units are fixed

Question # 17 (Sentence Completion)

Select the answer that correctly completes the sentence.

You can use _____ to attach a file in the activity of an account that is sent to you by your customer.

- A. a phone call
- B. a task
- C. notes
- D. service activities

Question # 18 (Multiple Choice)

A company is using Dynamics 365 Sales. A group of people want to access contacts data in Dynamics 365 Sales without having the license to access it.

Which export should you select?

- A. Dynamic Worksheet
- B. Excel Online
- C. Dynamic PivotTable
- D. Static Worksheet

Question # 19 (Multiple Choice)

A sales team is using Dynamics 365 Sales. The team wants to use the right Microsoft application to collaborate with other sales team members. The team needs to access the account information and make changes from there.

Which Microsoft application should the team choose?

- A. Microsoft SharePoint
- B. Microsoft Outlook
- C. Microsoft OneNote
- D. Microsoft Teams

Question # 20 (Sentence Completion)

Select the answer that correctly completes the sentence.

You will use _____ to send a customized quote with the data to the customer which includes your company logo and standard terms and conditions.

- A. an Excel Template
- B. an Email Template
- C. a Word Template
- D. an Article Template

Questions and Answers

Question # 1 (Multiple Choice)

A marketing agency wants to create a few lists of contacts and accounts to run a customer journey for their upcoming product launch.

Which two options should the agency use?

- A. Static Marketing List
- B. Static Segment
- C. Dynamic Marketing List
- D. Dynamic Segment

Answer:	B, D
Objective:	1.1 Describe Dynamics 365 Marketing capabilities
Rationale:	Static Segment: Static or dynamics segment will only be used in the customer journey. Dynamic Segment: Static or dynamics segment will only be used in the customer journey.
URL:	https://docs.microsoft.com/en-us/dynamics365/marketing/segments-vs-lists

Question # 2 (Multiple Choice)

You are using a Dynamics 365 Marketing application to create and send email campaigns to your customers. You want to create a segment in the Marketing application. You must use a solution that analyzes the data using Artificial Intelligence (AI) and the data collected from various applications.

Which application should you choose?

- A. Customer Voice
- B. Customer Service Insights
- C. Customer Insights
- D. Sales Insights

Answer:	C
Objective:	1.2 Describe marketing-related apps
Rationale:	Customer Insights: Segments will be created in Customer Insights, and you can push the segments to the Dynamics 365 Marketing application to run email campaigns or customer journey.

URL:	https://docs.microsoft.com/en-us/dynamics365/marketing/customer-insights-segments
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Question # 3 (Sentence Completion)

Select the answer that correctly completes the sentence.

A customer agrees with a quoted price and wants to place an order with a company. The salesperson wants to create an order for this quote. The quote can only be converted to an order when it is in _____ state.

- A. a draft
- B. an active
- C. a cancelled
- D. a revised

Answer:	B
Objective:	2.1 Describe the Dynamics 365 Sales lifecycle
Rationale:	Active State: You can close a quote only when it is in the Active state. If a quote is in an active state, it is in a non-editable state. If you want to edit the quote, you can change the state to revised. If you want to close the quote, you can close it from the active state.
URL:	https://docs.microsoft.com/en-us/dynamics365/sales/create-edit-quote-sales

Question # 4 (Multiple Choice)

You are reviewing the sales pipeline with your sales team. You want to know which opportunities have low winning confidence.

Which forecast category defines the confidence level?

- A. Pipeline
- B. Omitted
- C. Lost
- D. Committed

Answer:	A
Objective:	2.2 Describe sales-related apps
Rationale:	Pipeline: This is a forecast category that is used to define the confidence level. Forecast category as a Pipeline indicates the low confidence in winning the opportunity.
URL:	https://docs.microsoft.com/en-us/dynamics365/sales/configure-forecast

Question # 5 (Matching)

Match the solution on the left to the correct descriptions on the right.

Solution

Descriptions

- A. Dynamics 365 Sales Insights
 - B. Dynamics 365 Customer Insights
 - C. Dynamics 365 Sales
- _____ 1. Unify customer data across multiple sources to get a single view of a customer.
- _____ 2. Nurture Lead and Opportunities.
- _____ 3. Analyze customer interaction data stored in Dynamics 365 Sales and Microsoft 365.

Answer:	A3, B1, C2	
Objective:	2.2 Describe sales-related apps	
Rationale:	Dynamics 365 Sales Insights	Analyze customer interaction data stored in Dynamics 365 Sales and Microsoft 365. Dynamics 365 Sales and Microsoft 365 interaction data will be analyzed in Dynamics 365 Sales Insights.
	Dynamics 365 Customer Insights	Unify customer data across multiple sources to get a single view of a customer. Dynamics 365 Customer Insights will unify the data and create a single profile for customers.
	Dynamics 365 Sales	Nurture Lead and Opportunities. In Dynamics 365 Sales, you can create and manage, or nurture leads and opportunities.
URL:	https://docs.microsoft.com/en-us/dynamics365/sales/overview#dynamics-365-sales-premium	

Question # 6 (Multiple Choice)

A company is using Dynamics 365 Customer Service to manage their cases. The company created an entitlement with a future start date.

What will be the status of the entitlement when you activate it?

- A. Waiting
- B. Active
- C. Draft
- D. Cancelled

Answer:	A
Objective:	3.1 Describe Dynamics 365 Customer Service components
Rationale:	Waiting: An entitlement will be in the Waiting status until the start date. On the start date, the entitlement status will change to Active.
URL:	https://docs.microsoft.com/en-us/learn/modules/creating-and-managing-entitlements-in-dynamics-365/2-creating-entitlement-records

Question # 7 (Multiple Choice)

A company wants to track the support provided to its customers using tables. The tables need to include the type of support, the response time, and the channel that the customer used to contact support.

Which three tables should you choose?

- A. Omnichannel Chat Channel
- B. Entitlements
- C. Service Level Agreement
- D. Customer Service Schedule
- E. Entitlement Channel

Answer:	B, C, E
Objective:	3.1 Describe Dynamics 365 Customer Service components
Rationale:	<p>Entitlement: This is used to specify the support term based on the number of cases or number of hours. Based on the entitlement, agents are eligible to create cases for the customer.</p> <p>Service Level Agreement: When a case is created for a customer, either automatically or manually, you can add a Service level agreement and a timer will be added to the case.</p> <p>Entitlement Channel: By defining the channel for entitlement, you can track customer support terms for each channel.</p>
URL:	https://docs.microsoft.com/en-us/dynamics365/customer-service/define-service-level-agreements https://docs.microsoft.com/en-us/dynamics365/customer-service/create-entitlement-define-support-terms-customer

Question # 8 (Matching)

Match the rulesets on the left to the correct descriptions on the right.

Rulesets	Descriptions	
A. Routing Rules	_____	1. Automatically convert a service activity to a case.
B. Queue	_____	2. Automatically assign a case to the right agent.
C. Automatically record creation and update rules	_____	3. Categorize cases based on products and agents can access it.
Answer:	A2, B3, C1	
Objective:	3.1 Describe Dynamics 365 Customer Service components	
Rationale:	Routing Rules	Automatically assign a case to the right agent.

		Routing Rules are used to auto assign a case to the right agent.
	Queue	Categorize cases based on products and agents can access it. A Queue is a container used to store cases based on the category or products so an agent or group of agents can access it from a queue.
	Automatically record creation and update rules	Automatically convert a service activity to a case. This rule is used to convert an activity to a case.
	URL:	https://docs.microsoft.com/en-us/dynamics365/customer-service/create-rules-automatically-route-cases https://docs.microsoft.com/en-us/dynamics365/customer-service/automatically-create-update-records

Question # 9 (Sentence Completion)

Select the answer that correctly completes the sentence.

A work order status should be in a _____ status when a field technician starts traveling to a work order location.

- A. Scheduled
- B. In-Progress
- C. Completed
- D. Posted

Answer:	B
Objective:	4.1 Describe Field Service capabilities
Rationale:	In progress: When a technician starts travelling to the work order location, they will change the booking status to Traveling. The status of the work order will automatically be changed to In-Progress.
URL:	https://docs.microsoft.com/en-us/dynamics365/field-service/work-order-status-booking-status

Question # 10 (Multiple Choice)

Which feature of field service allows you to create questions to ensure that technicians are working in a safe environment and following safety protocols?

- A. Work Order Service Tasks
- B. Work Order Services
- C. Incident Type
- D. Inspections

Answer:	D
Objective:	4.1 Describe Field Service capabilities
Rationale:	Inspections: This provides capabilities to create a digital form that the technician is using to answer a list of questions provided.
URL:	https://docs.microsoft.com/en-us/dynamics365/field-service/inspections

Question # 11 (Matching)

Match the resource skillsets on the left to the correct descriptions on the right.

Resource Skillsets

- A. Resource Category
- B. Characteristic
- C. Rating Model

Descriptions

- _____ 1. Assembly Repair is an expertise that is needed by a resource to complete the work order.
- _____ 2. Proficient in Inventory Management is a value of the expertise or knowledge.
- _____ 3. Bookable resource's role is electrician.

Answer:	A3, B1, C2							
Objective:	4.2 Describe scheduling capabilities							
Rationale:	<table border="1"> <tr> <td>Resource Category</td> <td>Bookable resource's role is electrician. Resource categories are roles (i.e.: subcontractor, manager, etc.). In field service, you can group your resources by resource categories.</td> </tr> <tr> <td>Characteristic</td> <td>Assembly Repair is an expertise that is needed by a resource to complete the work order. A characteristic in the Field Service is a resource with the skills - Assembly Repair.</td> </tr> <tr> <td>Rating Model</td> <td>Proficient in Inventory Management is a value of the expertise or knowledge.</td> </tr> </table>		Resource Category	Bookable resource's role is electrician. Resource categories are roles (i.e.: subcontractor, manager, etc.). In field service, you can group your resources by resource categories.	Characteristic	Assembly Repair is an expertise that is needed by a resource to complete the work order. A characteristic in the Field Service is a resource with the skills - Assembly Repair.	Rating Model	Proficient in Inventory Management is a value of the expertise or knowledge.
Resource Category	Bookable resource's role is electrician. Resource categories are roles (i.e.: subcontractor, manager, etc.). In field service, you can group your resources by resource categories.							
Characteristic	Assembly Repair is an expertise that is needed by a resource to complete the work order. A characteristic in the Field Service is a resource with the skills - Assembly Repair.							
Rating Model	Proficient in Inventory Management is a value of the expertise or knowledge.							

		A rating model of the characteristic is proficient - Proficient in Inventory Management.
URL:	https://docs.microsoft.com/en-us/dynamics365/field-service/set-up-bookable-resources https://docs.microsoft.com/en-us/dynamics365/field-service/configure-schedule-board https://docs.microsoft.com/en-us/dynamics365/field-service/set-up-characteristics	

Question # 12 (Matching)

Match the type of scheduling on the left to the correct descriptions on the right.

Type of scheduling

- A. Schedule Assistant
- B. Resource Scheduling Optimization
- C. Manual Scheduling

Descriptions

- _____ 1. Automatic process to minimize travel time.
- _____ 2. Select requirement to create bookings using schedule board.
- _____ 3. Recommend times and resources for bookings.

Answer:	A3, B1, C2	
Objective:	4.2 Describe scheduling capabilities	
Rationale:	Schedule Assistant	<p>Recommend times and resources for bookings.</p> <p>The Schedule Assistant uses requirement details to recommend times and resources.</p>
	Resource Scheduling Optimization	<p>Automatic process to minimize travel time.</p> <p>Resource Scheduling Optimization will optimize the time based on resources and requirements.</p>
	Manual scheduling	<p>Select requirement to create bookings using schedule board.</p> <p>Manual scheduling is used to book a resource by schedule board.</p>
URL:	https://docs.microsoft.com/en-us/dynamics365/field-service/rso-optimization-goal	

	https://docs.microsoft.com/en-us/dynamics365/field-service/scheduling-capabilities
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Question # 13 (Multiple Choice)

A company is using Dynamics 365 Project Operations to manage sales and construction projects. You create a new project-based lead for a potential construction deal. After a few days, the lead is converted to an opportunity.

Which two records are required when you qualify a project-based lead?

- A. Account
- B. Project
- C. Opportunity
- D. Quote

Answer:	A, C
Objective:	5.1 Describe project sales capabilities
Rationale:	Account: The Account Name captured in the lead will create an account record in the application. Opportunity: The qualification of a lead will be converted to an opportunity, and a new opportunity record will be created as a reference for the lead.
URL:	https://docs.microsoft.com/en-us/dynamics365/project-operations/sales/manage-leads

Question # 14 (Multiple Choice)

A company is using Dynamics 365 Project Operations. A customer requests a change to a recent quote. You need to create a new quote and send the quote with revisions to your customer.

Which status is correct?

- A. Draft
- B. Closed as Lost
- C. Revised
- D. Closed as Won

Answer:	B
Objective:	5.1 Describe project sales capabilities
Rationale:	Closed as Lost: You cannot revise a quote in Project Operations. If revision is needed, the quote needs to be closed as lost. A new quote is created by copying the closed quote.
URL:	https://docs.microsoft.com/en-us/learn/modules/describe-sales-capabilities-of-dynamics-365-project-operations/5-review-quote-lifecycle

	https://docs.microsoft.com/en-us/dynamics365/project-operations/sales/sales-overview
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Question # 15 (Sentence Completion)

Select the answer that correctly completes the sentence.

The _____ allocation method should be used to book a resource for 20 hours over five working days. The resource’s available capacity is in a “First-in-first-consumed” order.

- A. Percentage Capacity
- B. Remaining Capacity
- C. Front Load Hours
- D. Evenly Distributed Hours

Answer:	C
Objective:	5.2 Describe project planning capabilities
Rationale:	Front Load Hours: This will consume resource available capacity in the first.
URL:	https://docs.microsoft.com/en-us/dynamics365/project-operations/resource-management/booking-allocation-methods

Question # 16 (Multiple Choice)

A company is using Dynamics 365 Project Operations. A project manager is creating a project schedule in the work breakdown structure and needs to make changes in the scheduling mode for the fixed duration task.

What is the correct impact if you revise the efforts?

- A. Units are recalculated
- B. Effort is recalculated
- C. Duration is recalculated
- D. Units are fixed

Answer:	A
Objective:	5.2 Describe project planning capabilities
Rationale:	Units are recalculated: If the tasks duration is fixed and you revise the efforts, units are recalculated.
URL:	https://docs.microsoft.com/en-us/dynamics365/project-operations/project-management/scheduling-modes

Question # 17 (Sentence Completion)

Select the answer that correctly completes the sentence.

You can use _____ to attach a file in the activity of an account that is sent to you by your customer.

- A. a phone call
- B. a task
- C. notes
- D. service activities

Answer:	C
Objective:	6.1 identify common customer engagement features
Rationale:	Notes: You can attach a document to the notes of an activity of the record.
URL:	https://docs.microsoft.com/en-us/powerapps/maker/model-driven-apps/set-up-timeline-control?context=/dynamics365/context/sales-context

Question # 18 (Multiple Choice)

A company is using Dynamics 365 Sales. A group of people want to access contacts data in Dynamics 365 Sales without having the license to access it.

Which export should you select?

- A. Dynamic Worksheet
- B. Excel Online
- C. Dynamic PivotTable
- D. Static Worksheet

Answer:	D
Objective:	6.1 identify common customer engagement features
Rationale:	Static Worksheet: When you download the excel in a static worksheet format, other users will be accessing the data without a license for Dynamics 365 Sales.
URL:	https://docs.microsoft.com/en-us/dynamics365/customerengagement/on-premises/basics/export-excel-static-worksheet https://docs.microsoft.com/en-us/powerapps/user/export-excel-static-worksheet

Question # 19 (Multiple Choice)

A sales team is using Dynamics 365 Sales. The team wants to use the right Microsoft application to collaborate with other sales team members. The team needs to access the account information and make changes from there.

Which Microsoft application should the team choose?

- A. Microsoft SharePoint
- B. Microsoft Outlook
- C. Microsoft OneNote
- D. Microsoft Teams

Answer:	D
Objective:	6.2 Describe integration options
Rationale:	Microsoft Teams: This application allows users to collaborate with other team members and connect to the Dynamics 365 Sales application data.
URL:	https://docs.microsoft.com/en-us/dynamics365/teams-integration/teams-install-app

Question # 20 (Sentence Completion)

Select the answer that correctly completes the sentence.

You will use _____ to send a customized quote with the data to the customer which includes your company logo and standard terms and conditions.

- A. an Excel Template
- B. an Email Template
- C. a Word Template
- D. an Article Template

Answer:	C
Objective:	6.2 Describe integration options
Rationale:	Word Template: Word templates will allow users to design and customize the template (add an image). Data will also be populated in the formatted document.
URL:	https://docs.microsoft.com/en-us/power-platform/admin/using-word-templates-dynamics-365