



MB-260^{Q&As}

Microsoft Customer Data Platform Specialist

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QUESTION 1

You are a Customer Data Platform Specialist. You need to create relationships to connect entities so that they can be further used in defining segments and measures by the marketing team.

Which three relationship types are available in audience insights? Each correct answer presents a complete solution. NOTE: Each correct selection is worth one point.

- A. Non-editable system relationships, created by the system as part of the data unification process
- B. Non-editable system relationships, which are created automatically from ingesting data sources
- C. Editable inherited relationships, created by the system as part of the data unification process
- D. Editable custom relationships, created and configured by users
- E. Non-editable inherited relationships, which are created automatically from ingesting data sources

Correct Answer: ADE

Reference: <https://docs.microsoft.com/en-us/dynamics365/customer-insights/audience-insights/relationships>

QUESTION 2

You are a Customer Data Platform Specialist. You are implementing a scheduled refresh in audience insights.

Which two statements are correct when describing scheduled refreshes? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

- A. To exclude a segment from a scheduled refresh, you must deactivate it before the scheduled refresh run.
- B. Scheduled refresh is not available in trial environments and can only be configured for production instances.
- C. The refresh schedule can be applied to selected data sources or specific entities within these data sources.
- D. When you configure a refresh schedule to run daily, you must define the time zone and time when the refresh needs to run.

Correct Answer: AD

Reference: <https://docs.microsoft.com/en-us/dynamics365/customer-insights/audience-insights/segments?tabs=b2c>
<https://docs.microsoft.com/en-us/dynamics365/customer-insights/audience-insights/system#schedule-tab>

QUESTION 3

DRAG DROP

As a Customer Data Platform Specialist, you set up audience insights as the new Customer Data Platform.



The product owner wants you to make sure that data sources are refreshed daily.

Which five actions should you perform in sequence? To answer, move the appropriate actions from the list of actions to the answer area and arrange them in the correct order.

Select and Place:

| Actions |
|--|
| Confirm the schedule by selecting Set, and then Save to activate the schedule. |
| In audience insights, go to datasources > edit a datasource and select the Schedule tab. |
| In audience insights, go to Admin > System and select the Schedule tab. |
| Set your time zone, then use the Time dropdown menu to set your refresh timing. |
| Set the repeat option to Daily. |
| Change the toggle at the top of the screen to On. |

| Order |
|-------|
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Correct Answer:

| Actions |
|--|
| |
| In audience insights, go to datasources > edit a datasource and select the Schedule tab. |
| |
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| Order |
|---|
| In audience insights, go to Admin > System and select the Schedule tab. |
| Change the toggle at the top of the screen to On. |
| Set the repeat option to Daily. |
| Set your time zone, then use the Time dropdown menu to set your refresh timing. |
| Confirm the schedule by selecting Set, and then Save to activate the schedule. |

QUESTION 4

DRAG DROP

You are a Customer Data Platform Specialist. Your company uses audience insights as their Customer Data Platform.

The marketing team wants to know the total amount the customer has spent. The order lines are linked to a profile as part of the point-of-sale data source and through their loyalty ID.

Which five actions should you perform in sequence to create this insight? To answer, move the appropriate actions from



the list of actions to the answer area and arrange them in the correct order.

Select and Place:

| Actions |
|---|
| Select New, and choose Build your own. |
| Select Edit name, and provide a Name for the measure. |
| In Audience Insights, go to Measures. |
| Select Run to calculate results for the configured measure, and save your measurements. |
| In the configuration area, choose MAX as the aggregation function. Select the order line entity and add the amount field. |
| In the configuration area, choose COUNT as the aggregation function. Select the order line entity and add the amount field. |
| In the configuration area, choose SUM as the aggregation function. Select the order line entity and add the amount field. |

Order

Correct Answer:



Actions

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In the configuration area, choose MAX as the aggregation function. Select the order line entity and add the amount field.

In the configuration area, choose COUNT as the aggregation function. Select the order line entity and add the amount field.

| |
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| |
|--|

Order

In Audience Insights, go to Measures.

Select New, and choose Build your own.

Select Edit name, and provide a Name for the measure.

In the configuration area, choose SUM as the aggregation function. Select the order line entity and add the amount field.

Select Run to calculate results for the configured measure, and save your measurements.

QUESTION 5



DRAG DROP You are a Customer Data Platform Specialist. The chief marketing officer (CMO) asked you to look at different use cases as you are implementing the Customer Insights platform. Which use case is applicable to either audience insights or engagement insights? To answer, drag the appropriate capability to the correct use case. Each capability may be used once, more than once, or not at all. You may need to drag the

split bar between panes or scroll to view content. NOTE: Each correct selection is worth one point.

Select and Place:

| |
|---------------------|
| Audience Insights |
| Engagement Insights |

Answer Area

A unified profile needs to be created from CRM customer data and sales data from the e-commerce solution.

The marketing manager wants to create segments based on suggested brand affinities from people in a similar demographic.

Customer Service needs to be able to see deep profile insights within the Dynamics 365 Customer Service application.

The company wants to collect, measure, and understand customer behavior on their website to optimize the website journey.

The sales manager wants to identify paths that customers navigate on the website before they make a purchase.

Correct Answer:



Audience Insights

Engagement Insights

Answer Area

A unified profile needs to be created from CRM customer data and sales data from the e-commerce solution.

Audience Insights

The marketing manager wants to create segments based on suggested brand affinities from people in a similar demographic.

Audience Insights

Customer Service needs to be able to see deep profile insights within the Dynamics 365 Customer Service application.

Audience Insights

The company wants to collect, measure, and understand customer behavior on their website to optimize the website journey.

Engagement Insights

The sales manager wants to identify paths that customers navigate on the website before they make a purchase.

Engagement Insights

QUESTION 6

You are a Customer Data Platform Specialist. You are reviewing the system status. You notice that an insights refresh process shows a "skipped" status. Which system process type should you review to find the step that is blocking the insights refresh from starting?

- A. Segments
- B. Search
- C. Enrichments
- D. Activities

Correct Answer: A

Reference: <https://docs.microsoft.com/en-us/dynamics365/customer-insights/audience-insights/system>



QUESTION 7

You are a Customer Data Platform Specialist. Your company implemented audience insights and Dynamics 365 Marketing. One of the data sources is the behavioral data from Dynamics 365 Marketing.

You are reviewing the segment requirements with the marketing team. The marketing team wants the segments to exclude people who already received a commercial email in the last seven days. The marketing team creates segments in

audience insights and Dynamics 365 Marketing.

Which option is the fastest way to fulfill the requirement?

- A. Create single dynamic segments in both audience insights and Dynamics 365 Marketing of customers who received a commercial email in the last seven days. Users can add an except rule with contacts from that segment in other individual segments.
- B. Create audience insights and Dynamics 365 Marketing segment templates that include the rule of contacts that received a commercial email in the last seven days.
- C. Create a single dynamic segment in audience insights of customers who received a commercial email in the last seven days. Make sure the segment is exported to Dynamics 365 Marketing. Users can add an except rule with contacts from that segment in other individual segments.
- D. Create an audience insights quick segment that includes the rule of contacts that received a commercial email in the last seven days. Make sure the quick segment is exported to Dynamics 365 Marketing.

Correct Answer: C

Reference: <https://docs.microsoft.com/en-us/dynamics365/customer-insights/audience-insights/export-dynamics365-marketing>

QUESTION 8

You are a Customer Data Platform Specialist. You are creating a new measure for business accounts (B2B) in audience insights.

One of the requirements for the new business-level measure is to add a dimension of the city for each business account.

What is needed to ensure that this measure is created as a business-level measure instead of a customer-level measure?

- A. Use the default "CustomerID*" dimension when creating the measure.
- B. Use the default "AccountID" dimension when creating the measure.
- C. Remove the default "AccountID" dimension when creating the measure.
- D. Remove the default "CustomerID*" dimension when creating the measure.

Correct Answer: D

Reference: <https://docs.microsoft.com/en-us/dynamics365/customer-insights/audience-insights/measures?tabs=b2b>



QUESTION 9

You are a Customer Data Platform Specialist. Audience insights users state that they are not able to quickly find details on specific customers while searching customer profiles. You explain the index and search capabilities within audience insights.

Which two statements are correct about configuring and using search and filter index capabilities? Each correct answer presents part of the solution.

NOTE: Each correct selection is worth one point.

- A. You can add up to 25 custom fields to index and configure filtering for each one of the fields as an administrator.
- B. The only fields that are available for indexing are the ones that exist in the customer profile that you created during the data unification process.
- C. You can only add a filter for a specific field from the search and filter index page in audience insights.
- D. Users with a contributor role can add fields on the search and filter index page in audience insights and configure how many filtered records to show.

Correct Answer: BC

Reference: <https://docs.microsoft.com/en-us/dynamics365/customer-insights/audience-insights/search-filter-index>

QUESTION 10

You are a Customer Data Platform Specialist. Dynamics 365 Customer Insights (CI) users have complained that they are not able to quickly find customers using main demographic data points. You must ensure users are able to search customers using any of the available fields.

Which two statements define the actions that should be completed to satisfy this requirement? Each option represents a partial solution.

NOTE: Each correct selection is worth one point.

- A. Validate you have access to edit the Search and index pages in audience insights.
- B. On the Search and filter index pane, add Last Name, Full Name, Email, Cell Phone, Street Address, and DOB fields to Index. Click Save and Run.
- C. You must run Merge in order to view the newly added fields on the customer profile.
- D. On the Search and filter index pane, Add Last Name, FullName, Email, Home Phone, DOB fields to Index. Click Save and Run.

Correct Answer: AB

The following fields from the unified customer record should be added to index: Last Name, Full Name, Email, Cell Phone, Street Address, DOB.



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Reference: <https://docs.microsoft.com/en-us/dynamics365/customer-insights/audience-insights/searchfilter-index>

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