



Vendor: Microsoft

Exam Code: AB-250

Exam Name: Transforming Contact Center Experiences with
AI in Dynamics 365

Version: DEMO

QUESTION 1

A company is implementing live chat on its customer support website by using Dynamics 365 Contact Center. The company has configured the environment and digital messaging capabilities.

The chat solution must ensure that incoming customer messages are routed to customer service representatives and made available through the website.

You need to complete the mandatory steps to set up and deploy the chat experience for the website.

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

NOTE: Each correct selection is worth one point.

- A. Publish all customizations.
- B. Configure chat widget properties.
- C. Configure authentication settings.
- D. Create a chat workstream.
- E. Validate widget behavior in a test environment.
- F. Embed the widget script into the website.

Answer: BDF

Explanation:

To set up live chat using Dynamics 365 Contact Center and embed it into your website, you must complete four core administrative configuration blocks:

[D]

Step 1. Create a Routing WorkstreamA workstream manages the data flow, routing rules, and queue allocation for your incoming chat requests.

[B]

Step 2. Configure the Chat Channel & WidgetThis step establishes the visual and behavioral settings of the live chat interface that customers interact with.

Within your workstream or via the Channels menu, select Set up chat.

Design the widget: Set the display name, theme color, logo, and placement positioning (e.g., bottom right).

Define behaviors: Set up operating hours, offline messages, and choose whether to leverage pre-conversation surveys or automated trigger greetings.

Enable features: Decide if customers and representatives can exchange file attachments, request voice/video escalations, or download transcripts.

Step 3. Attach User and Capacity Rules

Ensure your staff is capable of receiving the incoming interactions.

[F]

4. Embed the Widget into Your WebsiteOnce saved, Dynamics 365 will generate a unique snippet of code to bridge your website with the contact center.

Reference:

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

QUESTION 2

A company runs outbound campaigns that have high call volume.

The campaigns require efficient use of customer service representatives (CSRs) as well as minimizing idle time.

The dialing method must ensure that calls are automatically initiated and connected only when CSRs are available.

You need to configure the appropriate dialing method.

What should you do?

- A. Use predictive dialing mode.
- B. Configure call recording.
- C. Enable outbound workstream throttling.
- D. Configure Copilot voice agent.

Answer: A

Explanation:

The best action to take is to use predictive dialing mode.

In Dynamics 365 Contact Center, the predictive dial mode is explicitly designed for high-volume outbound campaigns. It uses a dynamic AI algorithm to pace and automatically initiate outbound calls based on forecasted availability. By considering factors such as representative availability, customer pick-up statistics, and call abandonment rates, it ensures that calls are initiated ahead of time so a live customer connects right as a customer service representative (CSR) becomes available. This maximizes agent utilization and minimizes idle time.

Reference:

<https://www.microsoft.com/en-us/dynamics-365/blog/it-professional/2026/02/03/proactive-voice-engagements-dynamics-365-contact-center>

QUESTION 3

A company plans to launch an outbound campaign targeting customers based on predefined engagement conditions.

The campaign must define how interactions are initiated, processed, and tracked.

You need to configure the campaign structure.

What should you configure?

- A. outbound dashboard metrics
- B. proactive engagement
- C. queue
- D. routing ruleset

Answer: B

Explanation:

In a Dynamics 365 Contact Center environment, launching a structured, targeted outbound campaign is accomplished natively using Proactive Engagement capabilities.

Reference:

<https://learn.microsoft.com/en-us/dynamics365/contact-center/administer/configure-proactive-engagement>

QUESTION 4

A company runs outbound campaigns that have high call volume.

The campaigns require efficient use of customer service representatives (CSRs) as well as minimizing idle time.

The dialing method must ensure that calls are automatically initiated and connected only when CSRs are available.

You need to configure the appropriate dialing method.

What should you do?

- A. Use preview dialing mode.
- B. Use Copilot dialing mode.
- C. Configure Copilot voice agent.
- D. Configure call recording.

Answer: A

Explanation:

Use preview dialing mode is the correct action to take to fulfill these requirements.

In Dynamics 365 Contact Center, Preview dial mode ensures that the system only initiates and places an outbound call to a customer after a Customer Service Representative (CSR) is identified from the queue, notified, and has accepted the call request. This mechanism guarantees that a CSR is immediately available when the call connects, effectively eliminating the risk of customer dead air or dropped calls while simultaneously safeguarding agent idle time.

Reference:

<https://learn.microsoft.com/en-us/dynamics365/contact-center/administer/configure-proactive-engagement>

QUESTION 5

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

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.	

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>

QUESTION 6

A company requires AI-driven optimization of service workflows.

The system must recommend improvements based on performance data.

You need to configure transformation analysis.

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

NOTE: Each correct selection is worth one point.

- A. Configure real-time Dynamics 365 Contact Center dashboards
- B. Use interaction data for analysis
- C. Enable the relevant admin agent
- D. Enable conversation diagnostics

Answer: BD

Explanation:

To effectively set up transformation analysis and AI-driven optimization in a Dynamics 365 Contact Center, you must enable analytics, define performance metrics, activate Copilot-driven insights, enable conversation diagnostics, and use interaction data for continuous analysis.

Omnichannel Analytics: Enabling historical and real-time analytics dashboards provides visibility into agent performance, customer satisfaction (CSAT), and operational efficiency.

Copilot & AI Insights: Activating Copilot allows the system to generate real-time conversation summaries, sentiment analysis, and automated suggestions to streamline agent workflows.

[D] Conversation Diagnostics: Turning on diagnostics helps administrators troubleshoot audio, connection, and data routing issues to ensure seamless interaction tracking.

[B] Interaction Data Utilization: Data from call transcripts, chat logs, and post-call surveys must be

continuously ingested and reviewed to refine automated routing, training models, and IVR workflows.

Reference:

<https://learn.microsoft.com/en-us/dynamics365/customer-service/administer/configure-customer-service-analytics-insights-csh>

QUESTION 7

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	Action
Automatically draft new knowledge articles.	▼ Enable Copilot conversation summaries. Configure knowledge analytics dashboards. Enable the Customer Knowledge Management Agent.
Improve accuracy of recommended articles.	▼ Configure knowledge sources. Configure Copilot knowledge plugins. Configure knowledge article categories. Configure the Customer Knowledge Management Agent.

Answer:

Customer Knowledge Management Agent configuration

Requirement	Action
Automatically draft new knowledge articles.	▼ Enable Copilot conversation summaries. Configure knowledge analytics dashboards. Enable the Customer Knowledge Management Agent.
Improve accuracy of recommended articles.	▼ 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>

QUESTION 8

Drag and Drop Question

A company integrates an external workforce management system with Dynamics 365 Customer

Service.

Routing must be based on customer service representatives' (CSRs) schedules from the external system.

CSRs must NOT receive work when they are unavailable based on those schedules.

You need to configure the routing behavior.

Which actions should you perform? 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.

External schedule integration and routing	
Requirement	Action
Ensure routing uses external schedules.	
Prevent assignment to unavailable CSRs.	

Actions
Enable capacity planning.
Enable shift-based routing.
Configure shift activity types.
Configure a non-Microsoft adapter.

Answer:

External schedule integration and routing	
Requirement	Action
Ensure routing uses external schedules.	Enable shift-based routing.
Prevent assignment to unavailable CSRs.	Configure shift activity types.

Actions
Enable capacity planning.
Enable shift-based routing.
Configure shift activity types.
Configure a non-Microsoft adapter.

Explanation:

Box 1: Enable shift-based routing

To base routing on external workforce management (WFM) schedules, you must configure shift-based routing and opt in each representative by setting the msdyn_generatecalendarfromshift column to True for the corresponding bookableresource entry.

Configuration Steps

Enable Workforce Management: Ensure Workforce Management for Customer Service is enabled or a non-Microsoft/WFM adapter is configured to import representative schedules into

Dynamics 365.

Opt-in Representatives: Set the msdyn_generatecalendarfromshift column to True on the bookableresource record for every agent included in shift-based routing.

Configure Unified Routing: Set up workstreams, advanced queues, and custom assignment methods in the Customer Service Admin Center to respect the imported shift calendars.

Box 2: Configure shift activity types

You should set up shift activity types, but they are only one component of a complete solution. To ensure that Customer Service Representatives (CSRs) do not receive work when they are unavailable, you must configure shift-based routing alongside your external Workforce Management (WFM) integration.

Configure Shift Activity Types: Define specific non-work activities (such as Breaks, Lunch, and Training) within your shift templates. When these activities are active, the system recognizes that the agent is unavailable for routing.

Reference:

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

<https://learn.microsoft.com/en-us/dynamics365/release-plan/2025wave1/service/dynamics365-contact-center/create-manage-shift-plans-effective-staffing-service-coverage>

QUESTION 9

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: C

Explanation:

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>

QUESTION 10

Drag and Drop Question

You are configuring multiple phone numbers for a company for its regional support.

Inbound calls must be routed appropriately. Outbound calls must display the specified caller ID.

You need to configure the phone numbers to meet the requirements.

Which actions should you perform? 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	Manage phone numbers in the voice channel
Assign the phone number to the workstream.	Requirement: Ensure inbound calls are routed appropriately.
Configure call recording for the phone number.	Action:
Associate the phone number with a Teams Phone resource account.	Requirement: Ensure outbound calls display the specified caller ID.
Associate the phone number with an outbound profile attached to the queue.	Action:

Answer:

Actions	Manage phone numbers in the voice channel
Assign the phone number to the workstream.	Requirement: Ensure inbound calls are routed appropriately.
Configure call recording for the phone number.	Action: Assign the phone number to the workstream.
Associate the phone number with a Teams Phone resource account.	Requirement: Ensure outbound calls display the specified caller ID.
Associate the phone number with an outbound profile attached to the queue.	Action: Associate the phone number with an outbound profile attached to the queue.

Explanation:

Box 1: Assign the phone number to the workstream

To ensure inbound calls are routed in the correct manner within a Dynamics 365 Contact Center environment, you must Assign the phone number to the workstream.

Dynamics 365 Contact Center (and Omnichannel for Customer Service), the workstream acts as the container that defines how conversations—including inbound voice calls—are routed to the correct queues and agents. When a customer dials a specific regional support number, the system uses the number's association with a workstream to initiate the routing rules.

Box 2: Associate the phone number with an outbound profile attached to the queue.

To ensure outbound calls display the specified regional caller ID in a Dynamics 365 Contact Center environment, you must associate the phone number with an outbound profile attached to the queue.

Outbound profiles define the caller ID, allowed calling regions, and settings used when representatives place outbound calls.

Queues must be linked to these outbound profiles so that the correct phone number/caller ID is assigned and presented to customers.

Reference:

<https://docs.aws.amazon.com/connect/latest/adminguide/proficiency-routing.html>

<https://learn.microsoft.com/en-us/dynamics365/customer-service/administer/voice-channel-outbound-calling>

QUESTION 11

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: A

Explanation:

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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