

<b>Exam</b>	<b>MB-260</b>
<b>Title</b>	<b>Microsoft Customer Data Platform Specialist (beta)</b>
<b>Version</b>	<b>1.0</b>
<b>Product Type</b>	<b>50 Q&amp;A with explanations</b>

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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

Answer: A,DE

Section: (none)

Explanation

Explanation/Reference:

Reference:

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

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### QUESTION 2

You are a Customer Data Platform Specialist. Your company operates mainly in the business-to-business (B2B) space.

The chief marketing officer (CMO) asks you to implement audience insights and ensure that it can handle the company's B2B scenarios and data.

Which statement is correct when considering audience insights for business accounts versus individual consumers?

- A. The out-of-the-box product recommendation prediction model is available for business accounts.
- B. Data ingestion features are different for business accounts and individual customers.
- C. Some enrichment types are available only for individual customer scenarios, while others are exclusively available for business accounts.
- D. Business accounts and individual consumers share the same audience insights environment.

Answer: C

Section: (none)

Explanation

Explanation/Reference:

Reference:

<https://docs.microsoft.com/en-us/dynamics365/customer-insights/audience-insights/work-with-businessaccounts>

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### QUESTION 3

You are a Customer Data Platform Specialist. Your company's chief marketing officer (CMO) learns about Dynamics 365 Customer Insights engagement insights capability. Your CMO wants to understand how engagement insights can be used to enhance audience insights.

Which two statements describe the benefits of engagement insights? Each correct answer presents part of the solution.

NOTE: Each correct selection is worth one point.

- A. It allows you to collect, measure, and understand customer behavior on your website.
  - B. It allows you to create new customer profiles within engagement insights that can be exported to audience insights.
  - C. It allows you to send new customer leads directly to a marketing automation platform.
  - D. It allows you to link audience insights and engagement insights environments to enable bidirectional data flow.
- [certexam.org](https://www.certexam.org)

Answer: A,D

Section: (none)

Explanation

Explanation/Reference:

Reference:

<https://docs.microsoft.com/en-us/dynamics365/customer-insights/engagement-insights/overview>

**QUESTION 4**

**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	<b>Answer Area</b> A unified profile needs to be created from CRM customer data and sales data from the e-commerce solution.	
Engagement Insights		

Correct Answer:

Audience Insights	<b>Answer Area</b> A unified profile needs to be created from CRM customer data and sales data from the e-commerce solution.	Audience Insights
Engagement Insights		Audience Insights
		Audience Insights
		Engagement Insights
		Engagement Insights

Section: (none)

Explanation

Explanation/Reference:

Reference:

<https://docs.microsoft.com/en-us/dynamics365/customer-insights/engagement-insights/overview>

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

**QUESTION 5**

**DRAG DROP**

You are a Customer Data Platform Specialist. You are in the process of implementing audience insights as the Customer Data Platform (CDP) solution for your company.

Your manager asks you to give a short presentation for new users who will be using audience insights and

explain some of the benefits that audience insights will offer them.

Which user group will take which benefit from audience insights? To answer, drag the appropriate user group to the correct benefit. Each user group 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 administrators	<b>Answer Area</b> Be able to see complete insights into the 360-degree customer profiles and activities.		
Business users		Enrich customer information with insights from audience intelligence, such as brand affinity and interests.	
Business analysts		Cleanse and standardize customer data across multiple, unlinked sources with AI-powered recommendations.	
		Have access to a rich collection of connectors to easily ingest customer data.	
		Be able to build customizable profiles, define measures, create segments, and benefit from predictive analytics.	

Correct Answer:

Audience insights administrators	<b>Answer Area</b> Be able to see complete insights into the 360-degree customer profiles and activities.	Business users
Business users		Audience insights administrators
Business analysts		Audience insights administrators
		Audience insights administrators
		Business analysts

Section: (none)

Explanation

Explanation/Reference:

Reference:

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

Ingest data into Customer Insights

Testlet 1

Case study

This is a case study. Case studies are not timed separately. You can use as much exam time as you would like to complete each case. However, there may be additional case studies and sections on this exam. You must manage your time to ensure that you are able to complete all questions included on this exam in the time provided.

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To display the first question in this case study, click the [Next](#) button. Use the buttons in the left pane to explore

the content of the case study before you answer the questions. Clicking these buttons displays information such as business requirements, existing environment, and problem statements. When you are ready to answer a question, click the Question button to return to the question.

### General Overview

AdventureWorks Cycles is a bicycle retailer with a few locations in the Midwest region. The AdventureWorks Cycles business model supports both in store purchases as well as online orders. In addition to offering a wide variety of bicycles, the company sells clothing, performance nutrition supplements, bicycle parts as well as bicycle fitting and repair services. The customer base varies from professional cyclists, individual leisure riders to families. The business experienced unprecedented growth of over 2000% during the pandemic bringing a total number of customers to 10,000. The company decided to invest in Microsoft Dynamics 365 Customer Insights and Dynamics 365 Sales App to unify customer data and improve sales.

### Data Source

AdventureWorks Cycles uses Customer Insights to connect to data from three different sources to generate a unified customer record. The data ingestion has been done for the initial data load. There are three data sources containing customer profile data loaded to a dedicated storage account and container in the Azure Data Lake:

Loyalty data source: This data source contains customer profile information from in-store purchases.

- loyalty.member.csv: srcid (primary key), firstname, lastname, middlename, fullname, addressstreet, loyalty\_email, city, zipcode, state, homephone, datecreated, timestamp

Ecommerce Data source: This data source contains customer profile information from online purchases.

- ecom.member.csv: ecid (primary key), firstname, last name, fullname, email, homephone, streetaddress, city, zip, state, datecreated, timestamp

Cycling Clubs Data Source: This data source contains customer profile information for members of Cycling clubs.

- cclubcust.csv: ccid (primary key) firstname, lastname, full\_name, email, main phone, streetaddress1, city, zip\_code, state, datecreated, datecreated, timestamp

The Loyalty data source contains the largest and most trusted dataset. It is considered the Primary Source followed by Ecommerce and Cycling Clubs Data Sources.

All three data sources share common customer demographics. Map, Match, and Merge (M3) rules within audience insights are applied accordingly to generate a unified customer record.

Additionally, there are three data sources that contain customer cellphone numbers for Loyalty, Ecommerce, and Cycling Club data sources that have been loaded to the Azure Data Lake but have not been ingested into audience insights.

cellPhone\_loyaly.csv: srcid (primary key), cellphone

cellPhone\_ec.csv: ecid (primary key), cellphone

cellPhone\_cc.csv: ccid (primary key), cellphone

### Pain Points

The AdventureWorks Cycles leadership team identified several pain points that need to be addressed immediately to support current growth and ensure customer satisfaction.

1. Lack of strategy for refreshing the customer data in the audience insights. There is a considerable effort needed to build pipelines to flow the incremental data updates into the Azure Data Lake so it can be ingested and processed in audience insights.
2. Customer Service reps cannot search for customers efficiently in audience insights which affects the customer satisfaction. Also, they do not have valid cell phone numbers for customers since it is not part of the profile.
3. The Sales team uses the Dynamics 365 Sales app but are not able to use segments generated in audience insights to generate marketing lists.
4. Marketing campaigns often sound redundant and inefficient as the same messaging is being sent to multiple members of the same household.
5. The Marketing team cannot create fully personalized communications due to missing Full Name in the unified customer record.
6. The test team is complaining that they do not have a dedicated UAT environment where they can test features before they are deployed to production.

### Project Goals

1. Create a strategy to implement incremental data refresh in prod audience insights that reads data from

Azure Data Lake Gen 2. In parallel configure incremental refresh in one of the non-production audience insights where all the data sources are available, loaded from Azure SQL database, through Power Query to audience insights instance. This will allow some testing of the incremental refresh functionality to be completed while the long-term strategy is being finalized.

2. Implement necessary changes to address the remaining pain points identified during the Leadership Team meeting.

Detailed Requirements

Pain Points

1. Configuring incremental refreshes for all customer data profiles as follows:
  - Incremental data refresh should be configured for member tables only
  - Timestamp data and time field should be used by the system to check when the record was last updated
  - All three tables should be refreshed every two days
2. Adding additional data sources and search fields to audience insights
  - Ingesting Cell phone data- the requirement is to keep the name of the data sources aligned with the design document. See section 1 for more details.
  - Furthermore, to get a quick snapshot of the quality of data, data profiling should be enabled for the phone fields only
  - The following fields from the unified customer record should be added to index: Last Name, Full Name, Email, Cell Phone, Street Address, DOB
3. Ability to use segments from the audience insights to generate marketing lists
  - The Sales team needs to generate a marketing campaign based on segment of customers who have a Loyalty email. (loyalty.email)
4. Ability to group customer profiles into a household cluster for purpose of generating targeted marketing communication
  - A household cluster is defined as customers who share Last Name, Street Address, City, Zip Code and State
5. Adding Full Name field to the unified customer record
  - Full Name is a merged field with the following merging policy
    - a. loyalty.member.fullname
    - b. ecom.member.fullname
    - c. cclubcust.csv.full\_name
6. Creating a sandbox environment that mirrors the current development environment
  - Create a sandbox environment called UAT1 and copy configurations from env. ""DEV1"".
  - a. Note: there is also an exiting environment called ""Dev"" and it is not configured correctly and should not be copied

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**QUESTION 6**

**DRAG DROP**

You are a Customer Data Platform Specialist. You are implementing an incremental refresh in audience insights. All the data is stored in an Azure SQL database and is ingested to audience insights using Power Query. You need to configure an incremental refresh for data sources.

Which four actions should you perform in sequence to meet this requirement? 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 that each entity within the data source that needs to be configured for the incremental refresh has a date column that is set when record is updated.

In Define the "last updated" field, select the timestamp field from customer profile table for Loyalty Member.

Select Loyalty member data sources on the incremental refresh settings page, enter lastname as a primary key for the table.

Set incremental refresh to every 2 weeks and Save.

Set incremental refresh to every 2 days and Save.

Select Loyalty member data sources on the incremental refresh settings page, enter srcid as a primary key for the table.

**Order**

Correct Answer:

**Actions**

Select Loyalty member data sources on the incremental refresh settings page, enter lastname as a primary key for the table.

Set incremental refresh to every 2 weeks and Save.

**Order**

Confirm that each entity within the data source that needs to be configured for the incremental refresh has a date column that is set when record is updated.

Select Loyalty member data sources on the incremental refresh settings page, enter srcid as a primary key for the table.

In Define the "last updated" field, select the timestamp field from customer profile table for Loyalty Member.

Set incremental refresh to every 2 days and Save.

Section: (none)

Explanation

Explanation/Reference:

Reference:

<https://docs.microsoft.com/en-us/dynamics365/customer-insights/audience-insights/incremental-refresh-datasources>

**QUESTION 7**

You are a Customer Data Platform Specialist. The marketing team requested that customer cellphone numbers be added to the customer profile in audience insights. The customer cellphone numbers are stored in a separate table in the Azure Gen 2 Storage Account.

You decide to create the data source(s) needed in audience insights.

Which statements best describes the steps needed to ingest the required data to audience insights?

- A. In audience insights, under Data, select Data Sources, add data source and select Azure data lake storage as an import method, enter name as ""?Loyalty Cell Phone"" and enter storage account name to authenticate. Repeat the steps for other tables.
- B. In audience insights, select Data Sources, add data source, enter ""?CellPhone"" in the name field and click Next.
- C. In audience insights, add data source and select Azure data lake storage as an import method, enter ""?cellPhone\_loyalty"" as a data source name, and then enter the container name and method to

authenticate. Repeat the same steps for other tables.

D. In audience insights, add data source and select Microsoft Dataverse as an import method, enter ""?CellPhoneloyalty""? as a data source name.

Answer: C  
Section: (none)  
Explanation  
Explanation/Reference:

Explanation:  
There are three data sources containing customer profile data loaded to a dedicated storage account and container in the Azure Data Lake.

Ingesting Cell phone data- the requirement is to keep the name of the date sources aligned with the design document.

cellPhone\_loyaly.csv: srcid (primary key), cellphone

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

**QUESTION 8**

**DRAG DROP**

You are a Customer Data Platform Specialist. You want to add data sources that connect to data in the organization's Azure Data Lake. You need to enable data profiling for the entity within the data source while creating it.

Which three actions should you perform in sequence to meet this requirement? 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
When creating each data source in audience insights, in the "Enable data profiling" step deselect the entity and select "cellphone" field only
Enable data profiling for cellPhone_loyalty, and cellPhone_ec after the data sources are created and the data is fully ingested from each source to audience insights
Click Save to start ingesting the data
Ensure the cellPhone_loyalty, cellPhone_ec, and cellPhone_cc data in the Azure Data Lake is in Common Data Model format

Order

Correct Answer:

Actions
Select Loyalty member data sources on the incremental refresh settings page, enter lastname as a primary key for the table.
Set incremental refresh to every 2 weeks and Save.

Order
Confirm that each entity within the data source that needs to be configured for the incremental refresh has a date column that is set when record is updated.
Select Loyalty member data sources on the incremental refresh settings page, enter srcid as a primary key for the table.
In Define the "last updated" field, select the timestamp field from customer profile table for Loyalty Member.
Set incremental refresh to every 2 days and Save.



Section: (none)

Explanation

Explanation/Reference:

Reference:

<https://docs.microsoft.com/en-us/dynamics365/customer-insights/audience-insights/connect-common-datamodel>

Ingest data into Customer Insights

Question Set 2

## QUESTION 9

### HOTSPOT

You are a Customer Data Platform Specialist. Your company has audience insights set up as their Customer Data Platform (CDP). The product owner entered a user story on your backlog to add data from the new loyalty solution into the CDP. You defined the data source. You are ready to add the loyalty contacts to the data unification process.

Which new data entity area should you select in the Map phase of the data unification process?

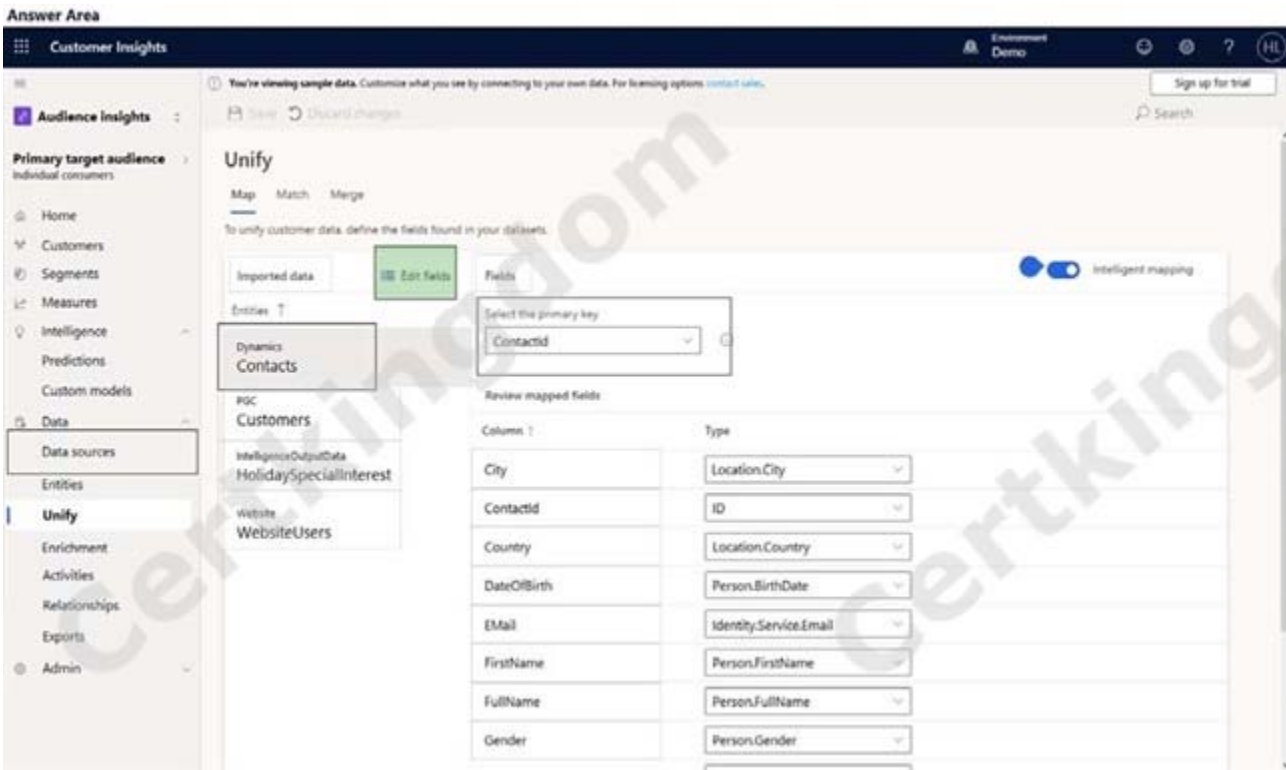
Hot Area:

Answer Area

The screenshot shows the 'Unify' interface in Microsoft Dynamics 365 Customer Insights. The 'Map' tab is selected, and the 'Dynamics Contacts' data source is chosen. The 'Review mapped fields' table is as follows:

Column 1	Type
City	Location.City
Contactid	ID
Country	Location.Country
DateOfBirth	Person.BirthDate
Email	Identity.Service.Email
FirstName	Person.FirstName
FullName	Person.FullName
Gender	Person.Gender

Correct Answer:



Section: (none)

Explanation

Explanation/Reference:

Reference:

<https://powerobjects.com/customer-insights/microsoft-dynamics-365-contacts-to-customer-insights/>

**QUESTION 10**

You are a Customer Data Platform Specialist. You completed all the steps in the match phase of the data unification process in the audience insights. You need to review and validate your match results. Which three metrics are available for you to validate the results? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

- A. Unique matched records
- B. Matched records only
- C. Matched and non-matched records
- D. Unique source records
- E. All source records

Answer: B,C,D

Section: (none)

Explanation

Explanation/Reference:

Reference:

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

**QUESTION 11**

You are a Customer Data Platform Specialist. You are in the process of implementing audience insights at a bank.

You finished setting up the different initial data sources. You are starting the unification process.

Which three tasks do you need to perform in the Mapping phase of the unification process? Each correct answer presents part of the solution.

NOTE: Each correct selection is worth one point.

- A. Identify the primary keys and semantic field types within the different entities.
- B. Identify the entities that you need to unify into a single profile.
- C. Identify the prioritization of similar fields between different entities.
- D. Select the fields you want to include the unified customer profile.
- E. Identify rules for duplication between different entities.

Answer: A,B,D

Section: (none)

Explanation

Explanation/Reference:

Reference:

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

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### QUESTION 12

You are a Customer Data Platform Specialist. Your marketing team is in the process of mapping entities and attributes in the data unification process of audience insights. You are assisting them with completing this task. Which two statements correctly describe how audience insights handles the mapping of semantic types for entity attributes? Each correct answer presents part of the solution.

NOTE: Each correct selection is worth one point.

- A. Attributes that are automatically mapped to a semantic type cannot be remapped to a custom semantic type.
- B. Attributes must be mapped to the semantic type of ID in order to be used as a primary key for the entity.
- C. The ""?Define the data in the unmapped fields"" section shows attributes that are not automatically mapped to a semantic type.
- D. The ""?Review mapped fields"" section shows all attributes for which a semantic type is automatically identified.

Answer: D

Section: (none)

Explanation

Explanation/Reference:

Reference:

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

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### QUESTION 13

You are a Customer Data Platform Specialist. Your organization is using Power Query when connecting to Data Sources in audience insights. You need to load eCommerce Contacts to audience insights. Which statement about loading data to audience insights using Power Query is correct?

- A. You must create a separate Power Query data source for each entity you wish to ingest.
- B. Power Query automatically recognizes header rows in files when you use the Text/CSV connector.
- C. After you save a Power Query data source, you have to manually trigger the initial refresh process.
- D. You can add additional entities to the data source using Get Data functionality in the Power Query.

Answer: D

Section: (none)

Explanation

Explanation/Reference:

Reference:

<https://docs.microsoft.com/en-us/dynamics365/customer-insights/audience-insights/connect-power-query>

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### QUESTION 14

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 in the review screen.

You are a Customer Data Platform Specialist. Your company's information technology department (IT) has a CSV file stored on one of their Shared Documents folders within their SharePoint sites which they have ingested into audience insights. The file contains a row header with some special characters, columns of different types (quantities, prices, etc.), and some rows with a high proportion of nulls and missing primary keys. You have been asked to clean and transform the data in audience insights to be ready for unification. What should you do?

Solution: Clean the data by removing any rows where the primary key is missing, delete any leading or trailing zeros on the primary key, and name the query. Click ""Next"" and your data is now ready for unification. Does this meet the goal?

- A. Yes
- B. No

Answer: B

Section: (none)

Explanation

Explanation/Reference:

Reference:

<https://docs.microsoft.com/en-us/dynamics365/customer-insights/audience-insights/connect-power-query>

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### QUESTION 15

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Solution: Clean the data by transforming the first row to be used as headers and removing special characters and spaces from header row, defining column types to be appropriate field types, remove rows with missing primary keys, and name the query. Click ""Next"" and your data is now ready for unification.

Does this meet the goal?

- A. Yes
- B. No

Answer: A

Section: (none)

Explanation

Explanation/Reference:

Reference:

<https://docs.microsoft.com/en-us/dynamics365/customer-insights/audience-insights/connect-power-query>

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### QUESTION 16

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.

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questions will not appear in the review screen.

You are a Customer Data Platform Specialist. Your company's information technology department (IT) has a CSV file stored on one of their Shared Documents folder within their SharePoint sites which they have ingested into audience insights. The file contains a row header with some special characters, columns of different types (quantities, prices, etc.), and some rows with a high proportion of nulls and missing primary keys. You have been asked to clean and transform the data in audience insights to be ready for unification. What should you do?

Solution: Clean the data by transforming the first row to be used as headers and remove any special characters in header, defining column types to be appropriate field types, remove any rows with missing primary key, and name the query. Create a full name and full address columns by merging the appropriate columns if they exist. Click "'?Next'" and your data is now ready for unification.

Does this meet the goal?

- A. Yes
- B. No

Answer: B

Section: (none)

Explanation

Explanation/Reference:

Reference:

<https://docs.microsoft.com/en-us/dynamics365/customer-insights/audience-insights/connect-power-query>

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### QUESTION 17

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 in the review screen.

You are a Customer Data Platform Specialist. Your company's information technology department already ingested a CSV file with column names in the first row into audience insights. You are asked to clean and transform the data to get it ready for unification.

What can you do to satisfy the requirements?

Solution: Clean the data by transforming the first row to be used as headers, defining column types to be appropriate field types, and naming the query. Create a full name column if it does not exist by merging the columns for the first name and last name. Click "'?Next'" and your data is now ready for unification.

Does this meet the goal?

- A. Yes
- B. No

Answer: A

Section: (none)

Explanation

Explanation/Reference:

Reference:

<https://docs.microsoft.com/en-us/dynamics365/customer-insights/audience-insights/connect-power-query>

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### QUESTION 18

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You are a Customer Data Platform Specialist. Your company's information technology department already



ingested a CSV file with column names in the first row into audience insights. You are asked to clean and transform the data to get it ready for unification.

What can you do to satisfy the requirements?

Solution: Clean the data by changing columns with numbers to integer number format, which includes fields such as price, number of purchases, and postal code. You should convert primary key to integer number field if it contains only numbers. Click ""?Next"" and your data is now ready for unification.

Does this meet the goal?

- A. Yes
- B. No

Answer: B

Section: (none)

Explanation

Explanation/Reference:

Reference:

<https://docs.microsoft.com/en-us/dynamics365/customer-insights/audience-insights/connect-power-query>

**QUESTION 19**

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You are a Customer Data Platform Specialist. Your company's information technology department already ingested a CSV file with column names in the first row into audience insights. You are asked to clean and transform the data to get it ready for unification.

What can you do to satisfy the requirements?

Solution: Clean the data by removing any rows with nulls and deleting any leading zeros on the primary key. Click ""?Next"" and your data is now ready for unification.

Does this meet the goal?

- A. Yes
- B. No

Answer: B

Section: (none)

Explanation

Explanation/Reference:

Reference:

<https://docs.microsoft.com/en-us/dynamics365/customer-insights/audience-insights/connect-power-query>

Create customer profiles by unifying data

Testlet 1

Case study

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To display the first question in this case study, click the Next button. Use the buttons in the left pane to explore the content of the case study before you answer the questions. Clicking these buttons displays information such as business requirements, existing environment, and problem statements. When you are ready to answer a question, click the Question button to return to the question.

### General Overview

AdventureWorks Cycles is a bicycle retailer with a few locations in the Midwest region. The AdventureWorks Cycles business model supports both in store purchases as well as online orders. In addition to offering a wide variety of bicycles, the company sells clothing, performance nutrition supplements, bicycle parts as well as bicycle fitting and repair services. The customer base varies from professional cyclists, individual leisure riders to families. The business experienced unprecedented growth of over 2000% during the pandemic bringing a total number of customers to 10,000. The company decided to invest in Microsoft Dynamics 365 Customer Insights and Dynamics 365 Sales App to unify customer data and improve sales.

### Data Source

AdventureWorks Cycles uses Customer Insights to connect to data from three different sources to generate a unified customer record. The data ingestion has been done for the initial data load. There are three data sources containing customer profile data loaded to a dedicated storage account and container in the Azure Data Lake:

Loyalty data source: This data source contains customer profile information from in-store purchases.

- loyalty.member.csv: srcid (primary key), firstname, lastname, middlename, fullname, addressstreet, loyalty\_email, city, zipcode, state, homephone, datecreated, timestamp

Ecommerce Data source: This data source contains customer profile information from online purchases.

- ecom.member.csv: ecid (primary key), firstname, last name, fullname, email, homephone, streetaddress, city, zip, state, datecreated, timestamp

Cycling Clubs Data Source: This data source contains customer profile information for members of Cycling clubs.

- cclubcust.csv: ccid (primary key) firstname, lastname, full\_name, email, main phone, streetaddress1, city, zip\_code, state, datecreated, datecreated, timestamp

The Loyalty data source contains the largest and most trusted dataset. It is considered the Primary Source followed by Ecommerce and Cycling Clubs Data Sources.

All three data sources share common customer demographics. Map, Match, and Merge (M3) rules within audience insights are applied accordingly to generate a unified customer record.

Additionally, there are three data sources that contain customer cellphone numbers for Loyalty, Ecommerce, and Cycling Club data sources that have been loaded to the Azure Data Lake but have not been ingested into audience insights.

cellPhone\_loyaly.csv: srcid (primary key), cellphone

cellPhone\_ec.csv: ecid (primary key), cellphone

cellPhone\_cc.csv: ccid (primary key), cellphone

### Pain Points

The AdventureWorks Cycles leadership team identified several pain points that need to be addressed immediately to support current growth and ensure customer satisfaction.

1. Lack of strategy for refreshing the customer data in the audience insights. There is a considerable effort needed to build pipelines to flow the incremental data updates into the Azure Data Lake so it can be ingested and processed in audience insights.

2. Customer Service reps cannot search for customers efficiently in audience insights which affects the customer satisfaction. Also, they do not have valid cell phone numbers for customers since it is not part of the profile.

3. The Sales team uses the Dynamics 365 Sales app but are not able to use segments generated in audience insights to generate marketing lists.

4. Marketing campaigns often sound redundant and inefficient as the same messaging is being sent to multiple members of the same household.

5. The Marketing team cannot create fully personalized communications due to missing Full Name in the unified customer record.

6. The test team is complaining that they do not have a dedicated UAT environment where they can test features before they are deployed to production.

## Project Goals

1. Create a strategy to implement incremental data refresh in prod audience insights that reads data from Azure Data Lake Gen 2. In parallel configure incremental refresh in one of the non-production audience insights where all the data sources are available, loaded from Azure SQL database, through Power Query to audience insights instance. This will allow some testing of the incremental refresh functionality to be completed while the long-term strategy is being finalized.
2. Implement necessary changes to address the remaining pain points identified during the Leadership Team meeting.

## Detailed Requirements

### Pain Points

1. Configuring incremental refreshes for all customer data profiles as follows:
  - Incremental data refresh should be configured for member tables only
  - Timestamp data and time field should be used by the system to check when the record was last updated
  - All three tables should be refreshed every two days
2. Adding additional data sources and search fields to audience insights
  - Ingesting Cell phone data- the requirement is to keep the name of the data sources aligned with the design document. See section 1 for more details.
  - Furthermore, to get a quick snapshot of the quality of data, data profiling should be enabled for the phone fields only
  - The following fields from the unified customer record should be added to index: Last Name, Full Name, Email, Cell Phone, Street Address, DOB
3. Ability to use segments from the audience insights to generate marketing lists
  - The Sales team needs to generate a marketing campaign based on segment of customers who have a Loyalty email. (loyalty.email)
4. Ability to group customer profiles into a household cluster for purpose of generating targeted marketing communication
  - A household cluster is defined as customers who share Last Name, Street Address, City, Zip Code and State
5. Adding Full Name field to the unified customer record
  - Full Name is a merged field with the following merging policy
    - a. loyalty.member.fullname
    - b. ecom.member.fullname
    - c. cclubcust.csv.full\_name
6. Creating a sandbox environment that mirrors the current development environment
  - Create a sandbox environment called UAT1 and copy configurations from env. ""DEV1"".
  - a. Note: there is also an existing environment called ""Dev"" and it is not configured correctly and should not be copied

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## QUESTION 20

You are a Customer Data Platform Specialist. The marketing team wants to send personalized marketing emails to customers, but the customer FullName attribute has not been correctly populated as part of the profile unification process.

You update the Map process to include the loyalty.member.fullname, ecom.member.fullname, and cclubcust.member.full\_name fields. Then, you map the fields to the Person.FullName semantic type. Audience insights automatically merges these fields into the FullName attribute on the Merge page.

What action should you perform to make sure the merged FullName field contains the most trusted data available?

- A. Edit the merged FullName field and combine fields by most recent based on timestamp in the source entity.
- B. Edit the merged FullName field and combine fields by least recent based on timestamp in the source entity.
- C. Separate the fields in the merged FullName field, create a new field, and add attributes in priority order.
- D. Edit the merged FullName field, combine fields by importance, and manually rank the source entities.

Answer: D