MB-230 Q&As

Microsoft Dynamics 365 Customer Service

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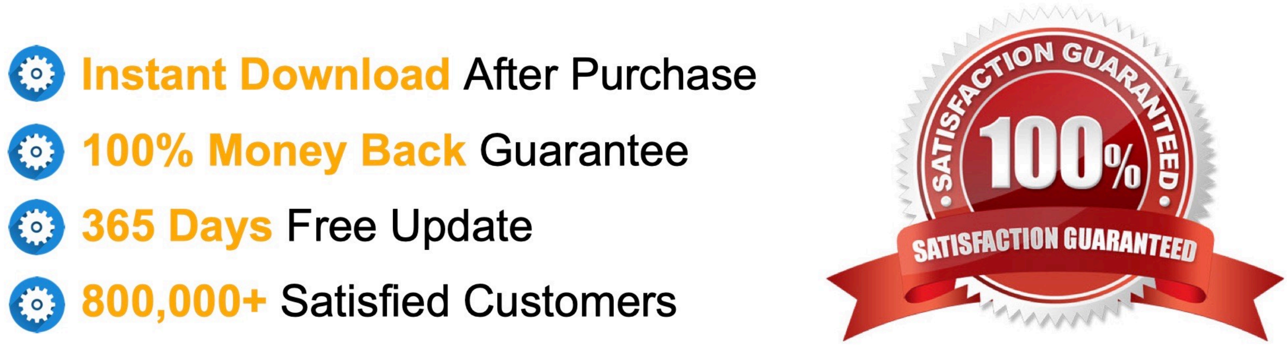

QUESTION 1

You need to create the SLAs.

Which three SLAs should you create? Each correct answer presents part of the solution.

NOTE: Each correct selection is worth one point.

Case Study Title (Case Study):Case Study

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Background

Humongous Insurance is contracted to process all insurance claims for a health facility that accepts the following types of health insurance:

1.

Health maintenance organization (HMO)

2.

Preferred-provider organization (PPO)

3.

Gold

Cases are classified as new claims, claim disputes, and follow-ups. Each insured person is entitled to open 25 new cases each calendar year.

Support representatives specialize by and process claims by insurance type.

Humongous Insurance currently accepts claims only by telephone. The call center is open from 06:00 GMT to 24:00 GMT daily. Call center staff work one of the following shifts: 06:00 GMT to 12:00 GMT, 12:00 GMT to 18:00 GMT, and 18:00 GMT to 24:00 GMT.

When a case is received by email, a staff member categorizes the case as email and closes the case immediately.

Current environment

1.

Humongous Insurance has three departments to handle claim types: HMO, PPO, and Gold.

2.

The company uses handwritten forms to send claims information to the correct department.

3.

Each department maintains a workbook to record calls received.

Requirements. Support desk

1.

Configure the system to track the number of insurance claims filed each year.

2.

Categorize claims by type as they are opened.

3.

Configure the system to track staff responsiveness to service-level agreements (SLAs).

4.

Ensure that business hours reflect the hours that support staff are scheduled.

Requirements. Case handling

1.

All new cases must be automatically placed into a queue based on insurance type after the type is selected.

2.

All insurance types need to be automatically moved to the proper queue when the subject is picked.

3.

All cases must be created and closed immediately when received.

4.

The status reason must be set to Email Sent or Phone Call.

5.

Information must be restricted by insurance and phone call type.

6.

Managers must be alerted when customers reach their limit of 25 cases for the year.

7.

Changes to cases must not be counted against entitlements until the case is closed.

Requirements. Disputes

1.

Claim disputes must be categorized as low priority.

2.

The status for all disputed cases must be set to Review by a Manager before a disputed case may be closed.

Requirements. Knowledge base

1.

A knowledge base must be used as a repository for all answers.

2.

Representatives must be able to search the knowledge base when opening a new case for similar claims.

3.

Representatives must be able to search across all entities at all times.

4.

Searches must check any field in the entity for matches in a single search.

5.

Searches must return results in a single list and sort the list so that the most relevant results appear at the top of the list.

6.

Representatives must be able to link the knowledge base to cases when applicable.

7.

Representatives must create a new knowledge base article if an answer is not found in the existing knowledge base.

8.

Representatives must be able to use SQL-like syntax to search the knowledge base.

Requirements. Service-level agreements

When a customer calls to open a claim, the company must respond to the caller within the following time frames:

Plan Response time

HMO 24 hours PPO 6 business hours Gold 1 business hour

Requirements. Alerts

1.

Cases must be flagged when they are past the SLA threshold.

2.

An email alert must be sent to the manager to indicate an SLA noncompliance.

3.

An email alert must be sent to representatives for SLA violations as follows: HMO 2 hours prior and PPO 1 hour prior.

4.

Send an email alert to support managers when disputes are ready to be closed.

5.

Send an email alert to customers when cases are closed.

Requirements. Issues

1.

The current process is all manual and not efficient.

2.

There is no easy way to determine whether the company is meeting its SLAs.

3.

Representatives are often inconsistent regarding how they handle customers and answer customer questions.

4.

There is no accountability for any of the representatives who take calls.

A. SLA with 24 hours as the failure time and no warning

B. SLA with 6 hours as the failure time and a one-hour warning

C. SLA with 6 hours as the failure time and no warning

D. SLA with one hour as the failure time and no warning

E. SLA with 24 hours as the failure time and a two-hour warning

Correct Answer: BDE

An email alert must be sent to representatives for SLA violations as follows: HMO 2 hours prior and PPO 1 hour prior.

QUESTION 2

DRAG DROP

You are customizing a Dynamics 365 Customer Service implementation for a call center.

The call center wants to enable SMS as a channel for the customer service department.

You need to complete the SMS channel configuration.

Which account information should you use for each provider? To answer, drag the appropriate types of account information to the correct SMS channel provider. Each type of account information 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:

Correct Answer:

Reference: https://docs.microsoft.com/en-us/dynamics365/customer-service/configure-sms-channel-twilio

https://docs.microsoft.com/en-us/dynamics365/customer-service/configure-sms-channel

QUESTION 3

You are a Dynamics 365 for Customer Service administrator.

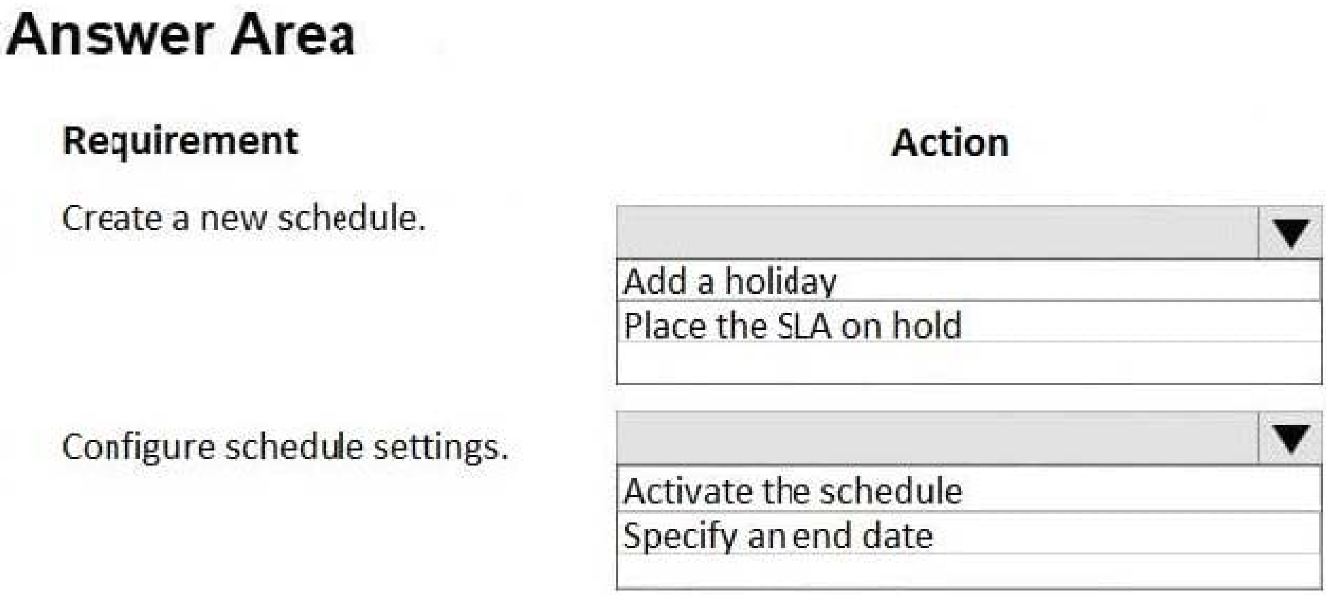
Members of the customer support staff must not be available on public holidays in the year 2021.

You need to configure holiday schedules.

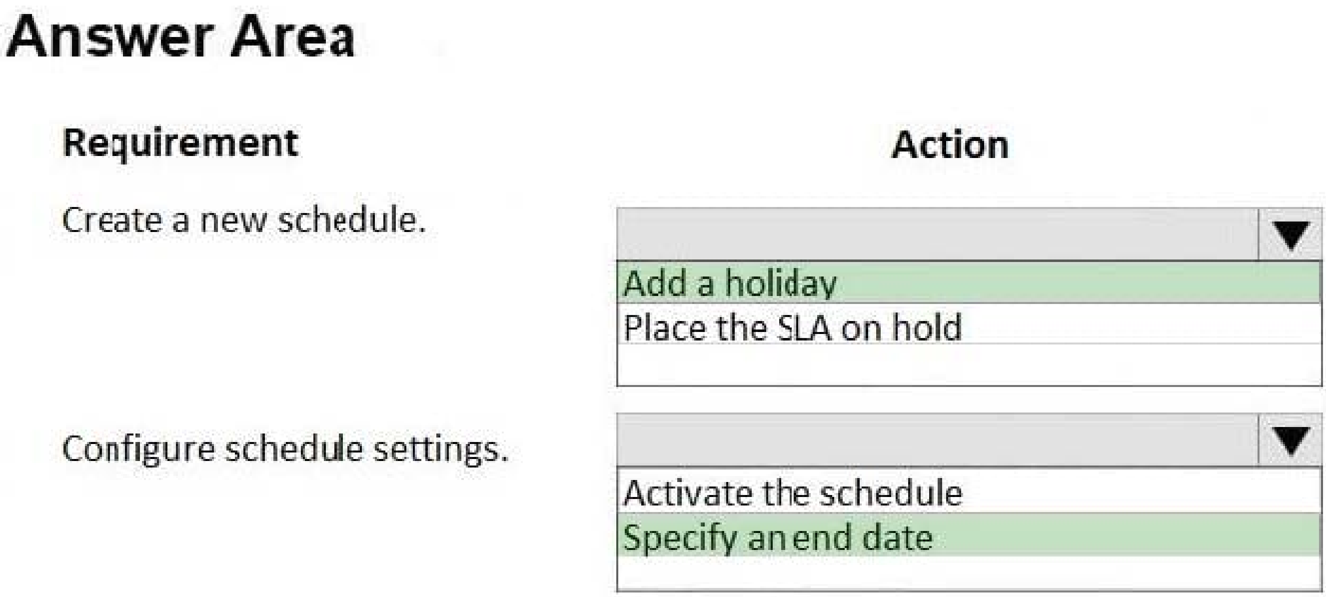
Which actions should you perform? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:



Correct Answer:



References: https://docs.microsoft.com/en-us/dynamics365/customer-engagement/customer-service/set-up-holiday-schedule

QUESTION 4

You need to implement service-level agreements.

Which type of agreements should you implement?

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Overview

The Phone Company provides mobile devices and services to corporate clients. Each client corporation has different agreements and service level agreements (SLAs) in place. Most clients have agreements that last one year and have 30

cases available. Half the cases may be opened by phone. The other half may be opened by email.

The company has an existing on-premises software system. The current system no longer meets the company\\'s needs.

The support desk is open 8:00 am to 8:00 pm Eastern Standard Time.

Requirements

Support desk

The company plans to implement Dynamics 365. The solution will include a custom entity that needs to be search enabled.

You must configure the system to ensure that you can determine how many support tickets and new orders tickets are received. You must be able to determine which device types have the most tickets opened for issues. Business hours in the system must reflect the hours support staff is scheduled.

Case handling

1.

New cases must automatically route to the correct support group by phone type or new purchase group without requiring custom code.

2.

The system must automatically create a case when email is received by companies that are not in the system.

3.

The system must automatically send a response to an email sender upon case creation for new orders, but not for service records.

4.

Users must be able to initiate routing for manually created cases.

5.

The system must create sub-cases from one customer with different cases and also if the same issue is reported by several customers. Subcases must inherit the following fields: customer name, contact email address and case title.

6.

Main cases must not be closed until all the sub-cases are closed.

7.

Separate groups must be created for each type of service and each phone type. Access to the groups must be restricted to team members that support that service or phone type.

8.

When importing from the old system, old cases do not need to be routed to the correct support group.

Knowledge base

1.

Users must be able to search the knowledge base when opening a new case form or when checking on cases.

2.

Users must be able to use relevant searches and include any customer entities.

Dashboards

1.

Managers must be able to see a real-time list of open cases, open activities, and expiring entitlements all on one page.

2.

Managers must also be able to see all open cases, escalated cases and cases by representatives on one screen. Managers must be able to drill down within each area.

3.

Managers need a dashboard that displays weekly statistics for cases and representatives.

4.

Each representative needs to see their own tickets that are opened for the day, week, and month as well as their closed tickets.

Service-level agreements

1.

Most customers must be contacted within 90 minutes of their case being opened.

2.

Some customers can purchase faster service on call backs.

3.

Emails must be sent to support managers when service-level agreements (SLAs) are missed.

4.

Support representatives must be able to see a timer on each case form to ensure they are adhering to their SLAs.

5.

SLA KPIs must be tracked in the system.

6.

SLA KPIs must appear on the case form.

7.

Cases must be able to be placed on hold if issues arise with related contracts.

Issues

Users report they are not able to search the Knowledge Base.

A. On-demand

B. Standard

C. Enhanced

D. Contact

Correct Answer: C

Reference: https://docs.microsoft.com/en-us/dynamics365/customer-service/define-service-level-agreements

QUESTION 5

You need to consider the underlined segment to establish whether it is accurate.

Routing rules must be used to automate the process of adding cases to a queue.

A. No adjustment required.

B. Business rules

C. Business process flow

D. Similarity rules

Correct Answer: A