MB-230 Q&As

Microsoft Dynamics 365 Customer Service

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QUESTION 1

HOTSPOT

A company uses Dynamics 365 Customer Service to provide product support to customers. Only employees are included in the company\\'s Azure Active Directory. You need to configure the system to meet the following requirements. You must minimize the effort required to complete any required configuration tasks.

Create a website for external customers to open support tickets and see the status of open issues. Ensure that customers are set up to use this website.

What should you configure? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

Requirement	Configuration
Portal creation	Create a portal by using the Customer self-service template Create a portal by using the Community portal template Create and share a model-driven app with your customers Create and share a canvas app with your customers
Customer setup	Ensure that all customers have a contact record Ensure that all customers have an account record Ensure that the appropriate model-driven app is shared with each customer Ensure that the appropriate canvas app is shared with each customer

Correct Answer:

Requirement	Configuration
Portal creation	Create a portal by using the Customer self-service template Create a portal by using the Community portal template Create and share a model-driven app with your customers Create and share a canvas app with your customers
Customer setup	Ensure that all customers have a contact record Ensure that all customers have an account record Ensure that the appropriate model-driven app is shared with each customer Ensure that the appropriate canvas app is shared with each customer

Box 1: Create a portal by using the Customer self-service template Create a website for external customers to open support tickets and see the status of open issues.

The Customer portal is a Power Apps portals template that lets companies create an externally facing business-to-business (B2B) website for scenarios that are related to sales order processing.

Customer self-service portal: A customer self-service portal enables customers to access self-service knowledge, support resources, view the progress of their cases, and provide feedback.

Its powerful self-service functionality guides customers to the answers they seek without human intervention or by connecting them to your most qualified agent for the task if the issue can\\'t be resolved client-side autonomously.

Box 2: Ensure that all customers have an account record. Ensure that customers are set up to use this website.

Note: Using the standard functionality, if I login to the Customer Service Portal I can create a new case linked either to myself as a Contact or to my related company as an Account (assuming that the Account is specificed on my contact

record in Dynamics 365 CE).

QUESTION 2

HOTSPOT

You are implementing Omnichannel for Customer Service for a hospital.

Each customer service agent has a chat capacity of 200.

The implementation requirements are as follows:

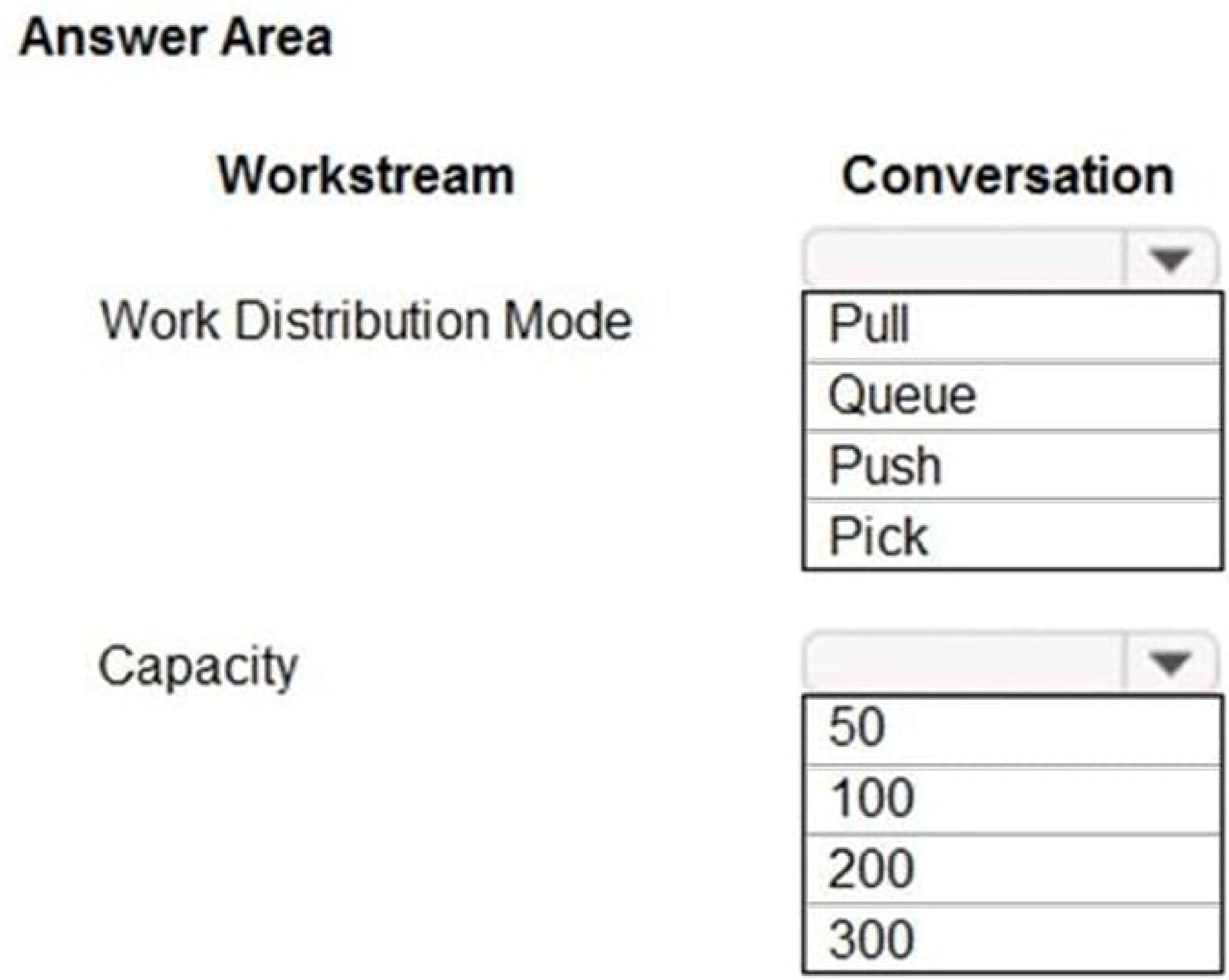
Each agent can take no more than two chats at a time.

A new conversation must auto assign to an available agent.

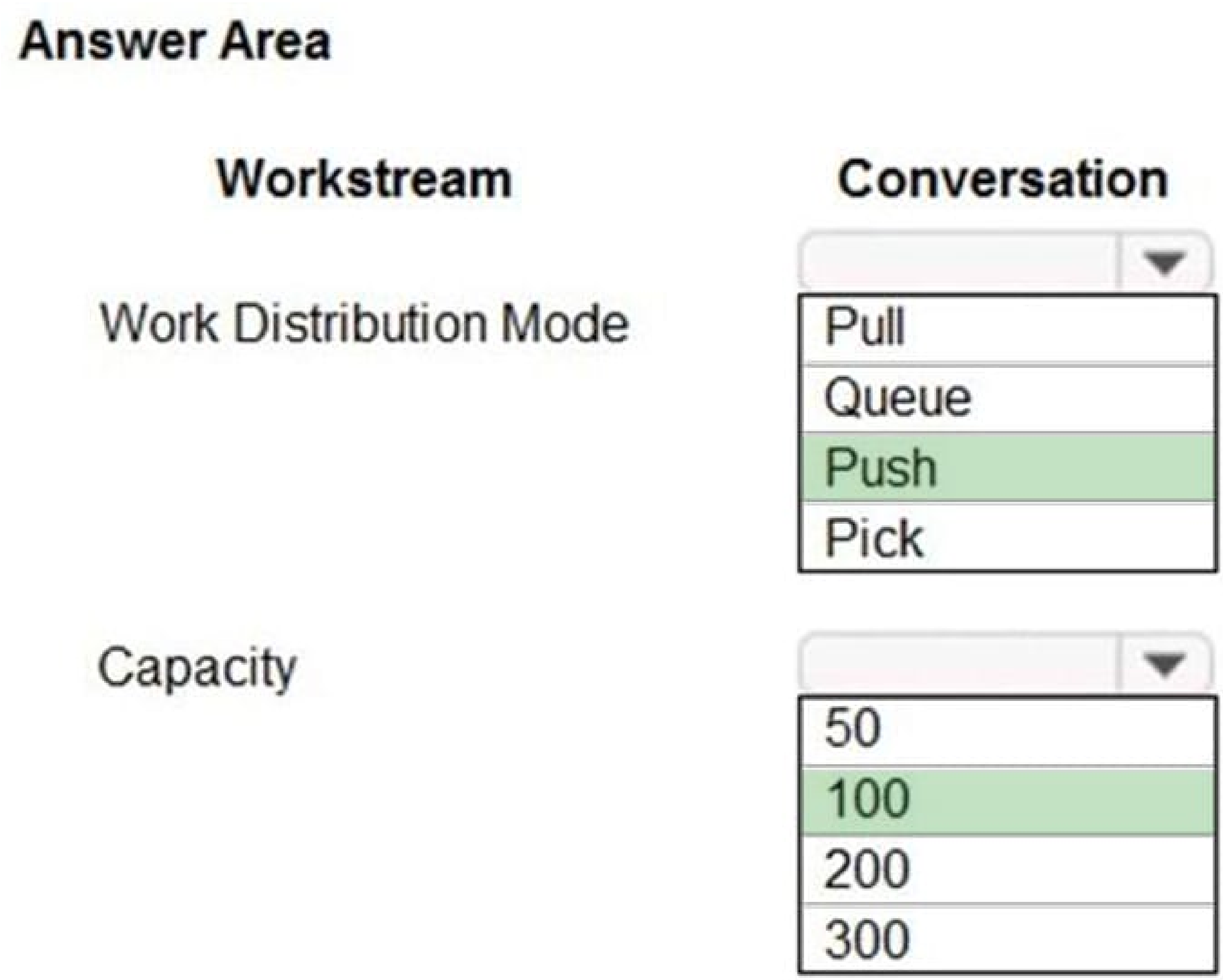
You need to select the conversation options to meet the requirements.

Which options should you configure?

Hot Area:



Correct Answer:



Reference: https://docs.microsoft.com/en-us/dynamics365/customer-service/unified-routing-work-distribution

QUESTION 3

You need to search for answers to customer claims.

Which type of search should you perform?

Case Study Title (Case Study):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.

To answer the questions included in a case study, you will need to reference information that is provided in the case study. Case studies might contain exhibits and other resources that provide more information about the scenario that is described in the case study. Each question is independent of the other questions in this case study.

At the end of this case study, a review screen will appear. This screen allows you to review your answers and to make changes before you move to the next section of the exam. After you begin a new section, you cannot return to this section.

To start the case study 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. If the case study has an All Information tab, note that the information displayed is identical to the information displayed on the subsequent tabs. When you are ready to answer a question, click the Question button to return to the question.

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. Timeline

B. Quick Find

C. Related

D. Detail

E. Case Relationships

Correct Answer: C

Reference: https://docs.microsoft.com/en-us/dynamics365/customer-service/search-knowledge-articles-csh#knowledge-base-search-control

QUESTION 4

DRAG DROP

You need to create the dashboards.

Which dashboard types should you use? To answer, drag the appropriate dashboard types to the correct scenario. Each dashboard type 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:

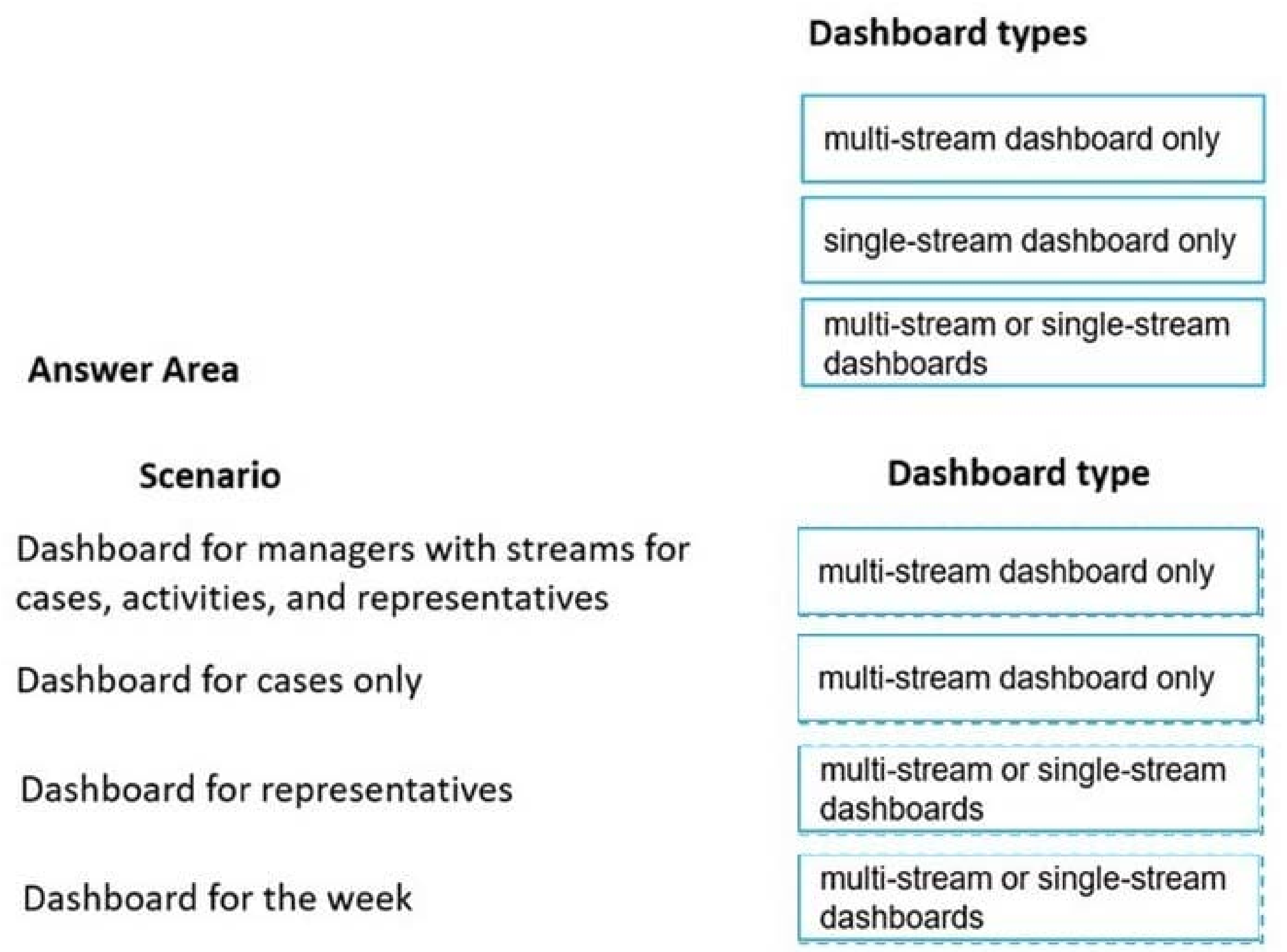
Dashboard types

- multi-stream dashboard only
- single-stream dashboard only
- multi-stream or single-stream dashboards

Answer Area

Scenario	Dashboard type
Dashboard for managers with streams for cases, activities, and representatives	
Dashboard for cases only	
Dashboard for representatives	
Dashboard for the week	

Correct Answer:



Reference: https://docs.microsoft.com/en-us/dynamics365/customer-service/customer-service-hub-user-guide-dashboard

QUESTION 5

You need to ensure that an appropriate resource for sick appointments can be scheduled.

What should you configure?

Case Study Title (Case Study):Case study

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Background

Lamna Healthcare Company provides health care services to communities across the region. The company provides telehealth services only and does not offer in-person appointments. The company has staff that speak English and Spanish.

The company is open from 8 AM to midnight Monday through Friday to provide services. Patients can make appointments by calling or using the internet. All appointments are conducted by phone or by using a computer.

Current environment. Services

Lamna provides two types of appointments: wellness and sick. A doctor and a nurse are scheduled for each sick appointment. A doctor or a nurse are scheduled for wellness appointments.

Current environment. Employees

General

Employees are located in the Pacific and Eastern time zones.

Case representatives

Case representatives handle incoming calls, provide information to patients for appointments, and schedule follow-up calls with doctors. Case representatives can also help with people who want to chat online.

All case representatives work eight-hour shifts. Case representatives typically focus on cases that involve one type of illness. The case representatives may back up others when call volumes are large.

Several case representatives speak both Spanish and English. The only company holidays the case representatives have off are New Year\\'s Eve day and New Year\\'s Day.

Customer satisfaction and escalation

Customer satisfaction representatives monitor all activity and ensure that there is a uniform process for all calls. Case managers schedule shifts and are a point of escalation.

Requirements. System and resources

1.

Each employee must use the system.

2.

Case managers must be users in the system but must not be available for the scheduling rotation or manually assigned.

3.

Patients must be offered at least three alternative times to schedule an appointment.

Requirements. Cases

1.

The system must support live chats, texting, and Twitter.

2.

Case representatives must be able to chat, text, and tweet without exiting the system they use to track calls.

3.

Case representatives must be able to chat live only with customers whose calls are routed or assigned to them.

4.

Managers must be able to monitor all communication as well as add or delete quick replies.

5.

Customer satisfaction representatives must be able to read agent scripts and workflows.

6.

A live chat must pop up each time someone fills out the form to register for an appointment. The live chat must automatically be sent to the case representative who is best qualified to answer the question.

7.

There are two type of queues: regular and escalated.

8.

Tickets must be routed to the most qualified representative for the illness.

9.

Tickets assigned to a representative must be automatically placed in that representative\\'s queue.

Requirements. Chat escalation process

1.

Each division must have one manager for escalations.

2.

Patients who request an escalation from the website must automatically be routed to a chatbot. The patient will answer predefined questions and will be alerted that someone will call them back. Chat transcripts must be sent to the appropriate manager.

3.

Only escalations must go to the chat bot.

4.

You must create two types of Omnichannel queues: regular and escalated.

5.

Only managers must be able to access the Omnichannel Insights dashboard.

Requirements. Managers

1.

Managers must be able to review weekly productivity reports for representatives by using Omnichannel Insights dashboards.

2.

Managers must be able to monitor patient moods during patients

Correct Answer: A

Reference: https://docs.microsoft.com/en-us/dynamics365/customer-service/basics-service-service-scheduling

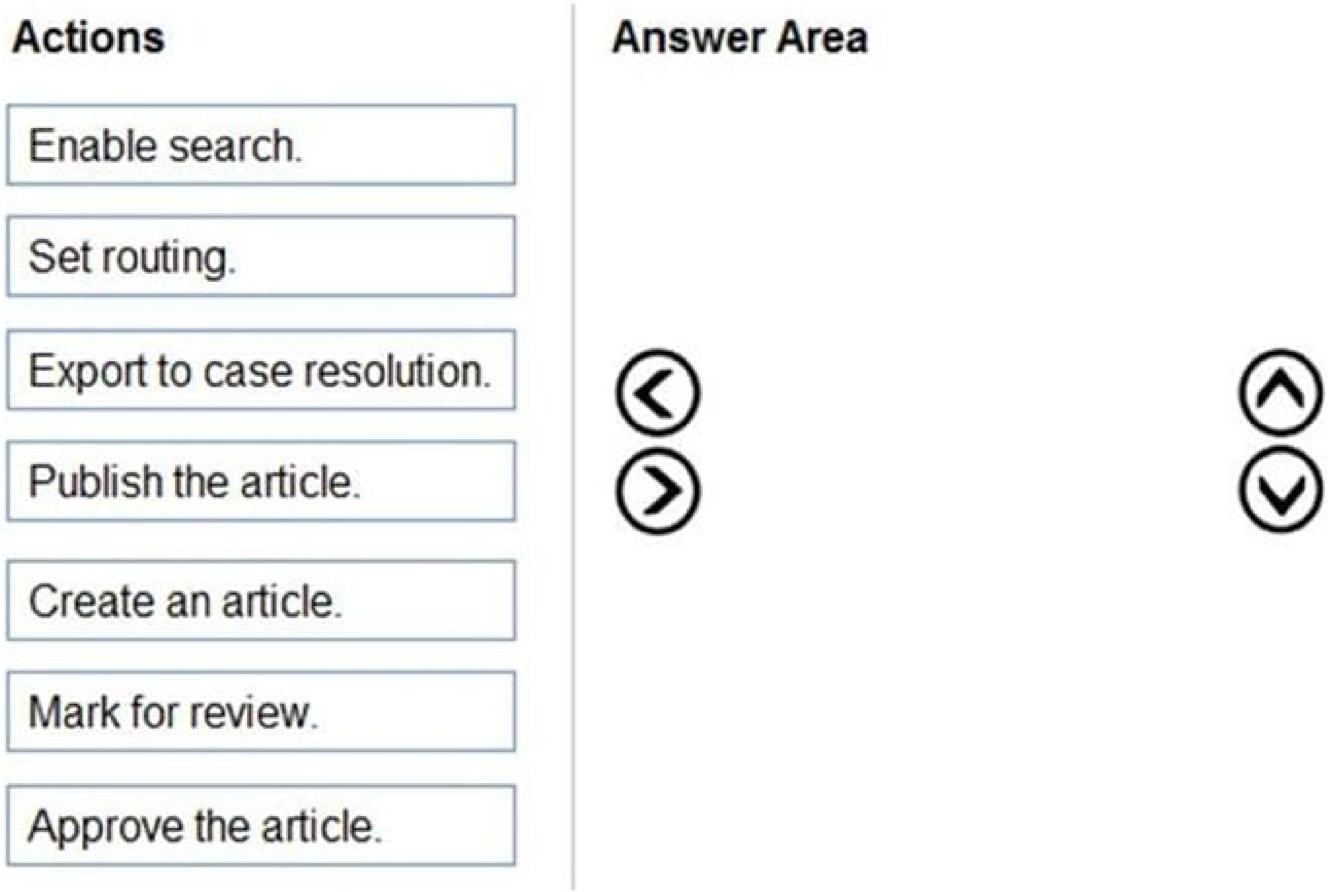
QUESTION 6

DRAG DROP

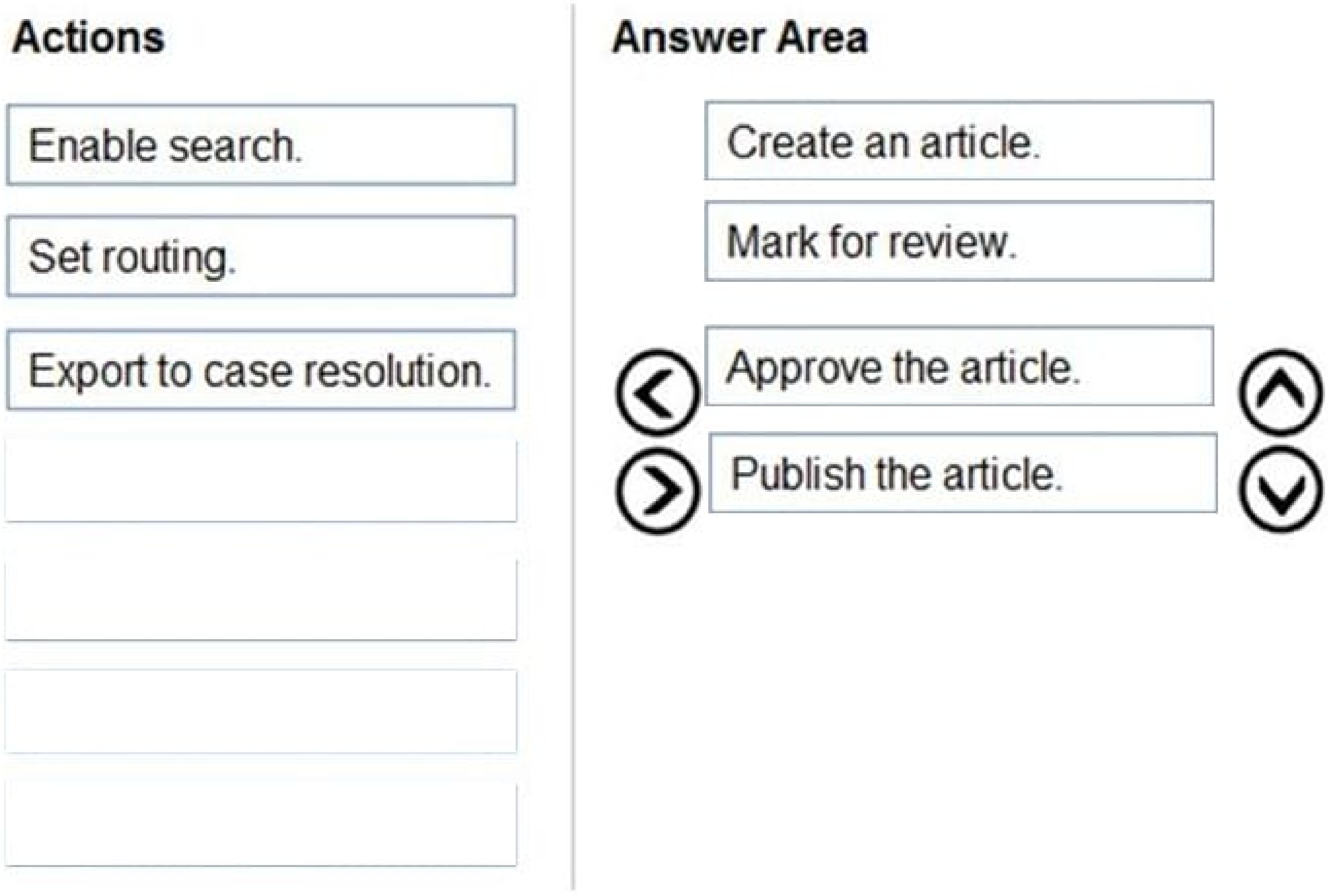
You need to configure the system to store answers about claims.

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

Select and Place:



Correct Answer:



Reference: https://docs.microsoft.com/en-us/dynamics365/customer-service/customer-service-hub-user-guide-knowledge-article

QUESTION 7

HOTSPOT

You are implementing Omnichannel for Customer Service for a call center.

The call center manager needs to be able to track agents

Correct Answer:

Answer Area

Action	Configuration
Assign the Omnichannel security role to needed to access the dashboard	CSR manager Omnichannel agent Omnichannel supervisor
Obtain data to add the custom KPIs	Common Data Service Power BI datasets SQL Server

Reference: https://docs.microsoft.com/en-us/dynamics365/customer-service/configure-intraday-dashboard-supervisor

QUESTION 8

You are implementing Dynamics 365 Customer Service for a call center. There are separate queues for level1 and level2.

1.

You need to set up the queues to meet the following requirements:

2.

Users must have their own queues that no one else can access.

3.

Users must not be able to view each other\\'s queue.

4.

Users must be able to work from the support queue. Solution:

1.

Set up each user queue to be private.

2.

Set up level1 and level2 queues to be public and add applicable members.

3.

Set up the support queue to be public. Does the solution meet the goal?

A. Yes

B. No

Correct Answer: B

Reference: https://docs.microsoft.com/en-us/dynamics365/customer-service/set-up-queues-manage-activities-cases

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QUESTION 9

You are implementing a help desk system that enables users to submit cases by using telephone or email.

You need to ensure that cases are classified correctly.

What should you do?

A. Configure relevance search

B. Configure categorized search

C. Create security roles by support function. Assign the security role to users.

D. Modify\\' the subject tree.

Correct Answer: D

Define subjects to categorize cases, products, and articles.

To edit a subject, in the Subject Tree, select a subject, and then under Common Tasks select Edit Selected Subject.

Reference:

https://docs.microsoft.com/en-us/power-platform/admin/define-subjects-categorize-cases- products-articles

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QUESTION 10

HOTSPOT

A company that manufactures industrial heating, ventilation, and air conditioning units (HVAC) is implementing Dynamics 365 Customer Service.

The company requires a presales solution that handles presales inquiries and existing customer support calls. The solution must meet the following requirements:

Presales inquiry handling must be maintained separately from support call handling.

Presales inquiries captured from the company website must be handled by dedicated teams for each country on a first-come, first-served basis. Support calls for specific HVAC systems must be directed only to their respective certified technicians.

You need to configure the solution.

Which components should you configure? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

Requirement	Component
Dedicated presales team inquiries	Queues Workstream Assignment ruleset
Separate support calls from presales maintenance	Role Queues Workstream
Calls assigned to technicians according to their certification	Assignment ruleset Capacity profile Prioritization ruleset Skill attachment rules

Correct Answer:

Requirement	Component
Dedicated presales team inquiries	Queues Workstream Assignment ruleset
Separate support calls from presales maintenance	Role Queues Workstream
Calls assigned to technicians according to their certification	Assignment ruleset Capacity profile Prioritization ruleset Skill attachment rules

Box 1: Queue

Presales inquiries captured from the company website must be handled by dedicated teams for each country on a first-come, first-served basis.

The idea of FIFO queuing, also called first-come, first-served (FCFS) queuing, is simple:

The first item that arrives at a router is the first item to be handled.

Box 2: Workstream

Presales inquiry handling must be maintained separately from support call handling.

A workstream is a container to enrich, route, and assign work items. The workstream is associated with a channel, such as live chat, voice, or case.

The workstream can belong to multiple channels of the same type, like multiple chat channels. In this case, all the conversations from these channels inherit the routing and work assignment settings of the workstream they belong to.

Box 3: Assignment ruleset

Support calls for specific HVAC systems must be directed only to their respective certified technicians.

Assignment methods determine how a work item is assigned. You can use the out-of-the- box assignment methods or build custom assignment rules by configuring the prioritization rules and assignment rulesets The following assignment methods are available out of the box:

*

Highest capacity: Assigns work item to the agent with the highest capacity, among those who have the skills identified during the classification stage, and who have the presence as specified in the allowed presence option of the workstream. In this assignment method, the work items are prioritized in the first in first out manner, that is, the work item that was created first is assigned first. If more than one agent is available with the same capacity, the work item is assigned randomly.

*

Round robin

QUESTION 11

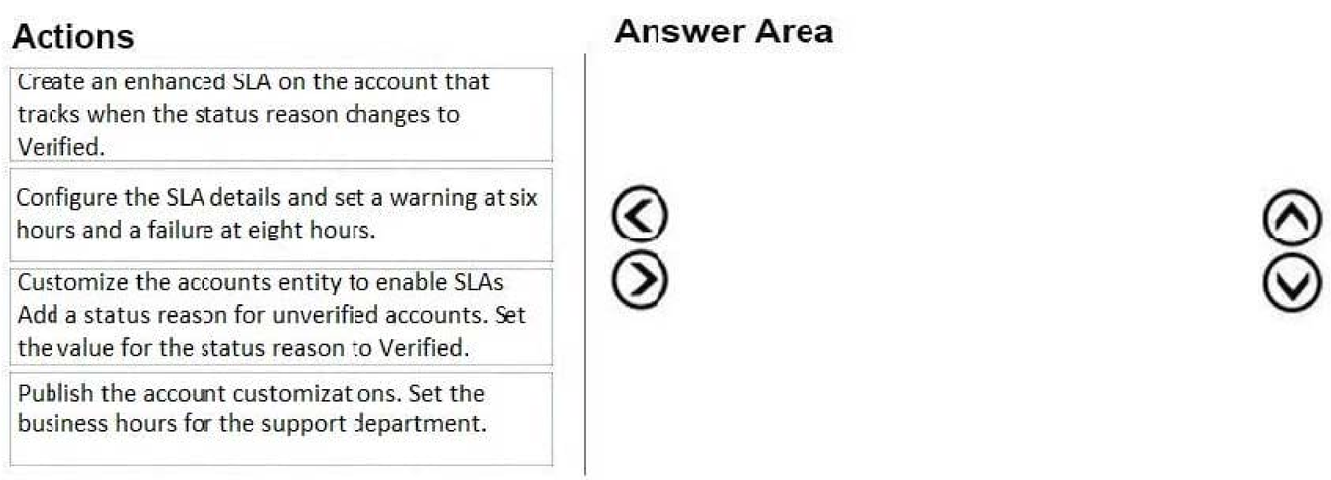
You are a Dynamics 365 for Customer Service administrator. Your company provides support between 9 a.m. and 5 p.m.

You must add a warning to account records when service representatives do not contact an account within eight business hours of the account being verified.

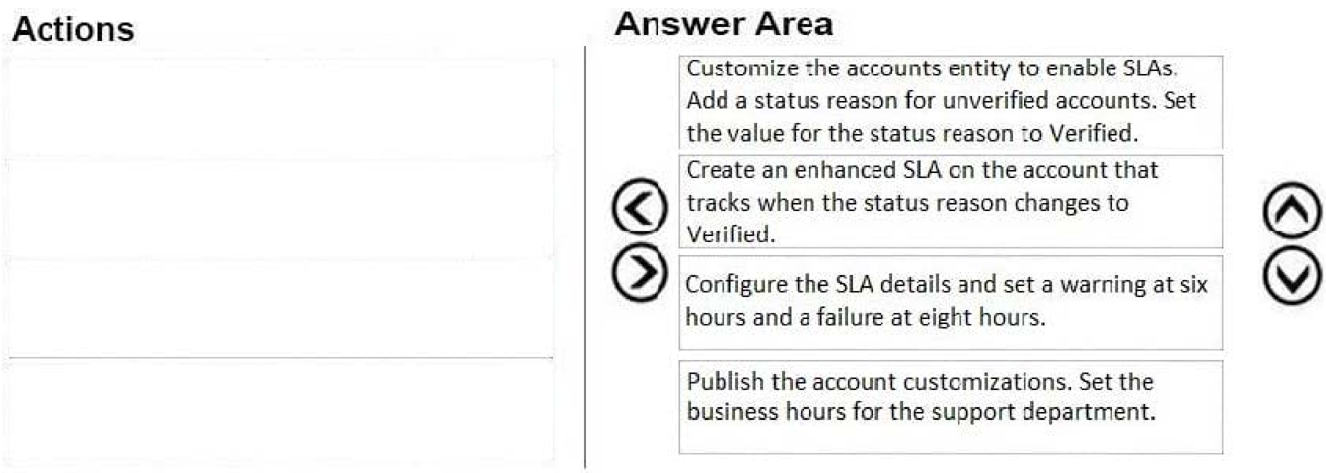
You need to enable service-level agreements (SLAs) for accounts.

In which order should you perform the actions? To answer, move all actions from the list to the answer area and arrange them in the correct order.

Select and Place:



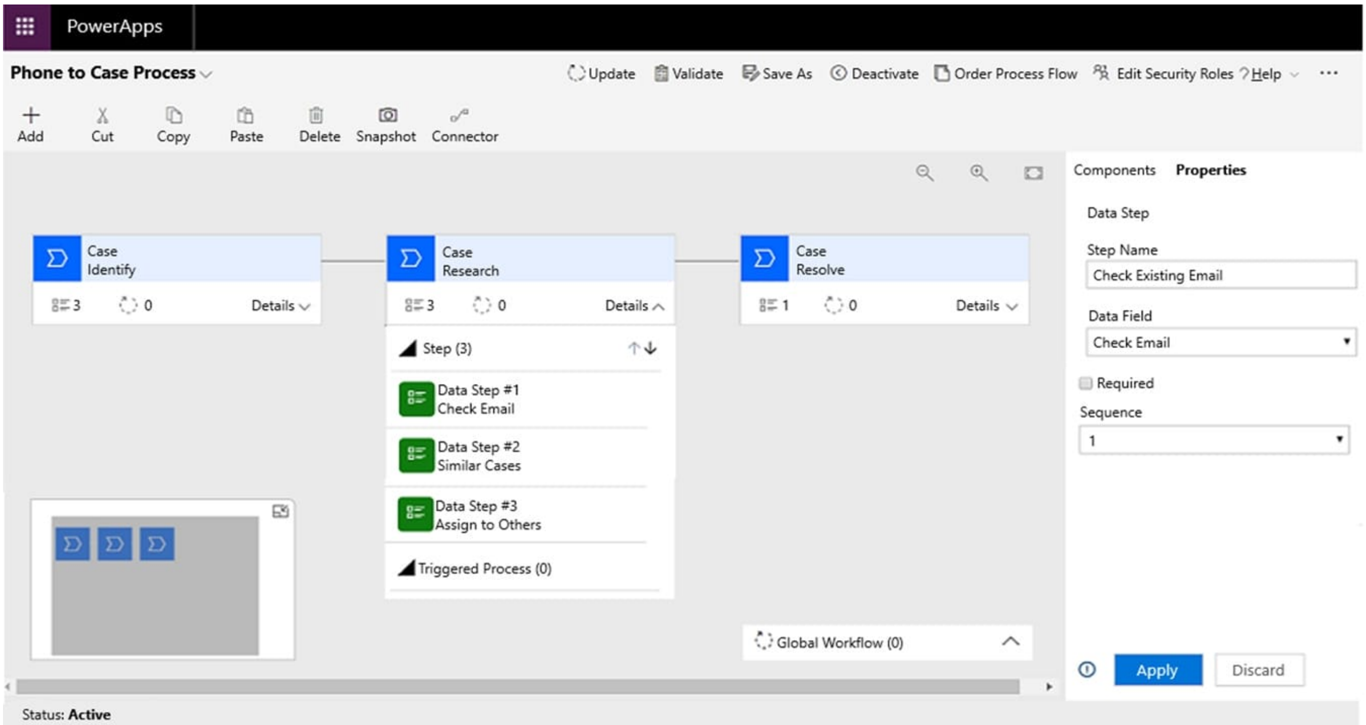
Correct Answer:



QUESTION 12

HOTSPOT

You are modifying the phone-to-case process in Dynamics 365 Customer Service. You create a flow by using PowerApps as shown in the exhibit. (Click the Exhibit tab.)



You must modify the business process flow to include the check-email step at the beginning of the research stage.

Use the drop-down menus to select the answer choice that answers each question based on the information presented in the graphic.

NOTE: Each correct selection is worth one point.

Hot Area:

Answer Area

Question	Answer Choices
You need to change the step name from **Check Email** to **Check Existing Email** and ensure that the change displays in the process. What should you select?	Apply Add Validate
Where can you configure the Check email field?	Properties Add Components
Which type of process is this?	Business process flow Workflow Dialog Microsoft Flow

Correct Answer:

Answer Area

Question	Answer Choices
You need to change the step name from **Check Email** to **Check Existing Email** and ensure that the change displays in the process. What should you select?	Apply Add Validate
Where can you configure the Check email field?	Properties Add Components
Which type of process is this?	Business process flow Workflow Dialog Microsoft Flow

Reference: https://docs.microsoft.com/en-us/power-automate/create-business-process-flow?context=/dynamics365/context/sales-context#edit-a-business-process-flow

QUESTION 13

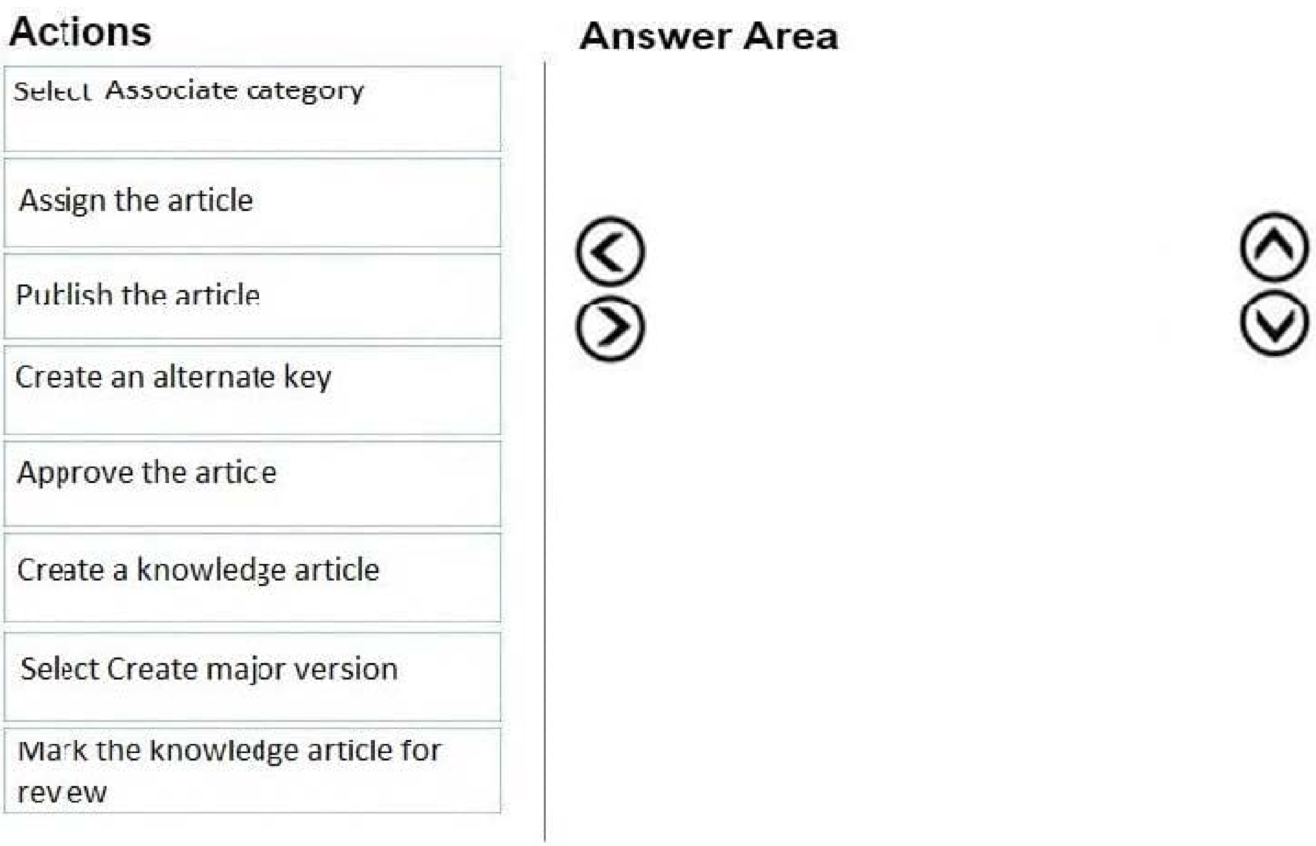
A customer uses Dynamics 365 for Customer Service.

Customer service representatives must be able to create knowledge base articles.

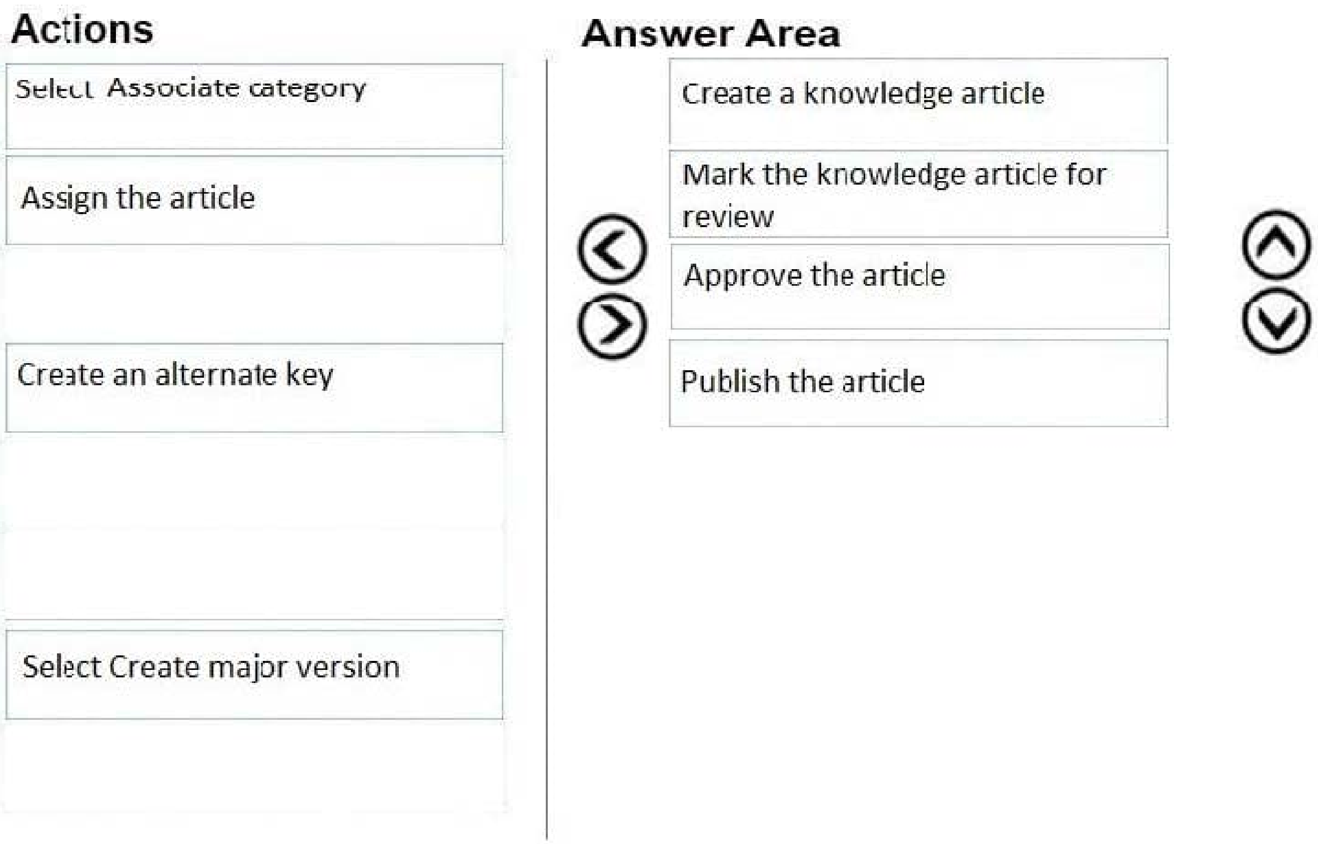
You need to ensure that all knowledge base articles are submitted for review and approval before they are made available to use.

Which four actions must be performed 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:



Correct Answer:



References: https://docs.microsoft.com/en-us/dynamics365/customer-engagement/customer-service/customer-service-hub-user-guide-knowledge-article

QUESTION 14

A fitness company has several locations.

The company implements Dynamics 365 Customer Service and uses it to schedule personal trainer sessions with customers.

Customers report the following issues:

Customers are assigned personal trainers who do not reside at the customer\\'s location.

Customers are assigned personal trainers during the trainers\\' non-working hours.

You need to resolve the issues.

Which two settings should you configure? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

A. Customer Service Calendar

B. resource skills

C. Work Hours

D. facility resources

E. Fulfillment Preferences

Correct Answer: AC

Reference: https://docs.microsoft.com/en-us/dynamics365/customer-service/resources-service-scheduling

QUESTION 15

You are creating surveys for Voice of the Customer (VoC).

You need to configure VoC to ensure that recipients can unsubscribe to surveys.

Which two survey features should you use? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

A. Add an Unsubscribe check box after each question.

B. Set the Allow unsubscribe setting to Yes.

C. Give users the option to unsubscribe from different features of the survey.

D. Configure the survey to display when Dynamics 365 customers receive email and enable the Unsubscribe option.

Correct Answer: BD

References:

https://docs.microsoft.com/en-us/dynamics365/customer-engagement/voice-of- customer/design-advancedsurvey#add-the-unsubscribe-option-to-a-survey