MB-230Q&As

Microsoft Dynamics 365 Customer Service

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QUESTION 1

HOTSPOT

You need to set the schedule to meet requirements for appointments. How should you configure the settings? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

Answer Area

Preference	Setting
Interval	30 minutes 1 hour 90 minutes 15 hours
Start time	8:00 A.M. 8:30 A.M. 12:00 A.M. 12:30 A.M.
End time	8:00 A.M. 8:30 A.M. 12:00 A.M. 12:30 A.M.
Results per interval	3 8 12 Auto-schedule

Correct Answer:

Answer Area

Preference	Setting
Interval	30 minutes 1 hour 90 minutes 15 hours
Start time	8:00 A.M. 8:30 A.M. 12:00 A.M. 12:30 A.M.
End time	8:00 A.M. 8:30 A.M. 12:00 A.M. 12:30 A.M.
Results per interval	3 8 12 Auto-schedule

Box 1: 30 minutes

Nurses and doctors must be booked for 30-minute time slots.

Box 2: 8: A.M.

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.

Box 3: 12.00 A.M.

Box 4: 3

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

QUESTION 2

Your company makes use of Dynamics 365 for Customer Service.

You have been tasked with configuring available working hours for help desk staff. The staff have different schedules.

You are preparing to configure individual working hours.

Which two of the following options should you configure?

A. Service management.

B. Security settings.

C. System settings

D. All customer service calendars.

Correct Answer: AD

QUESTION 3

You need to configure the system so that an email is sent to a manager about the SLAs according to the requirements. What should you configure?

Case Study Title (Case Study):Case study

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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. Failure Action

B. Warning Action

C. Applicable When

D. Success Criteria

E. Success Action

Correct Answer: A

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

QUESTION 4

A company uses Dynamics 365 Customer Service. The app is shared by agents and the inventory department. The inventory department manages the products. The agents have read-only access.

Agents must have access to the products to add the products to cases. The agents do not need to view the products in the sitemap.

You need to prevent agents from viewing products in the sitemap while maintaining the ability for the inventory department.

What should you do?

A. Set product privileges to Basic for the agents.

B. Configure the site map subarea privileges of the product table.

C. Set product privileges to Local for the agents.

D. Configure the site map to remove the subarea where the product is displayed.

Correct Answer: D

Explanation:

To hide specific area/subarea we need to play around with:

User Security Role

+

Sitemap Area Privilege

+

A Custom Dummy Entity (optional - can be achieved with standard entity).

We need to update the SiteMap privileges for all the Sub Area.

To hide the Navigation Area, we need to hide all the Subarea objects.

Reference:

https://www.alphabold.com/create-a-role-based-sitemap-navigation-in-dynamics-365-ce/

QUESTION 5

You are a Dynamics 365 Customer Service administrator. You are creating a customer service schedule. You need to ensure that the schedule shows the correct time zone for available customer service hours. What should you do?

A. Set the time zone in each customized schedule.

B. Allow the system to automatically convert to each user\\'s time zone when a user signs in.

C. Set the time zone in Dynamics 365 personal options.

D. Set the time zone to GMT (Coordinated Universal Time) to enable conversion when you sign in.

Correct Answer: A

Reference: https://docs.microsoft.com/en-us/dynamics365/customer-service/create-customer-service-schedule-define-work-hours

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QUESTION 6

DRAG DROP

You are a Dynamics 365 for Customer Service administrator.

Your company requires a new phone-to-case business process flow for customer service representatives to follow.

The stages are as follows:

1.

Verification

2.

Acknowledgement and research

3.

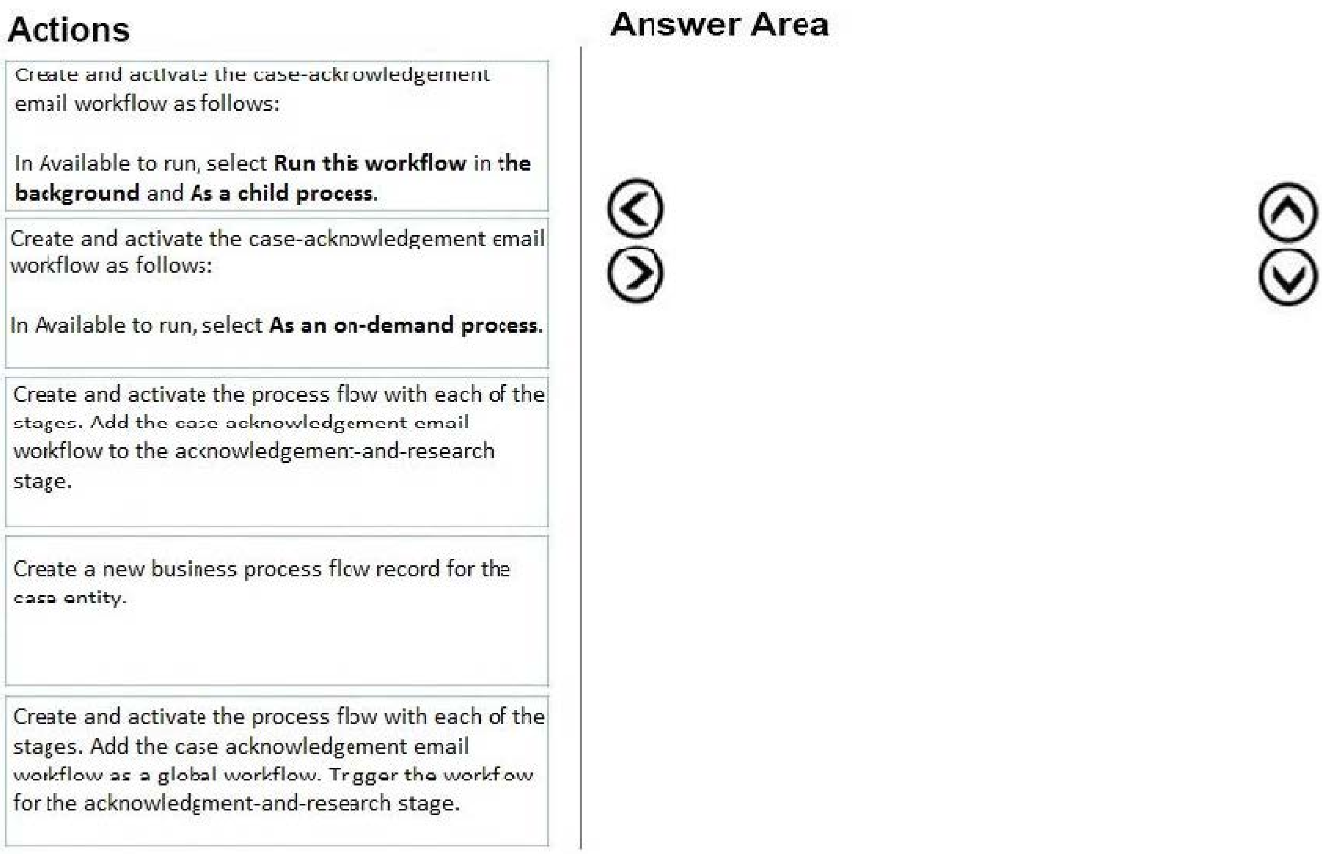
Resolution

Customer service representatives must send an email to the customer when a case enters the acknowledgement-and-research stage.

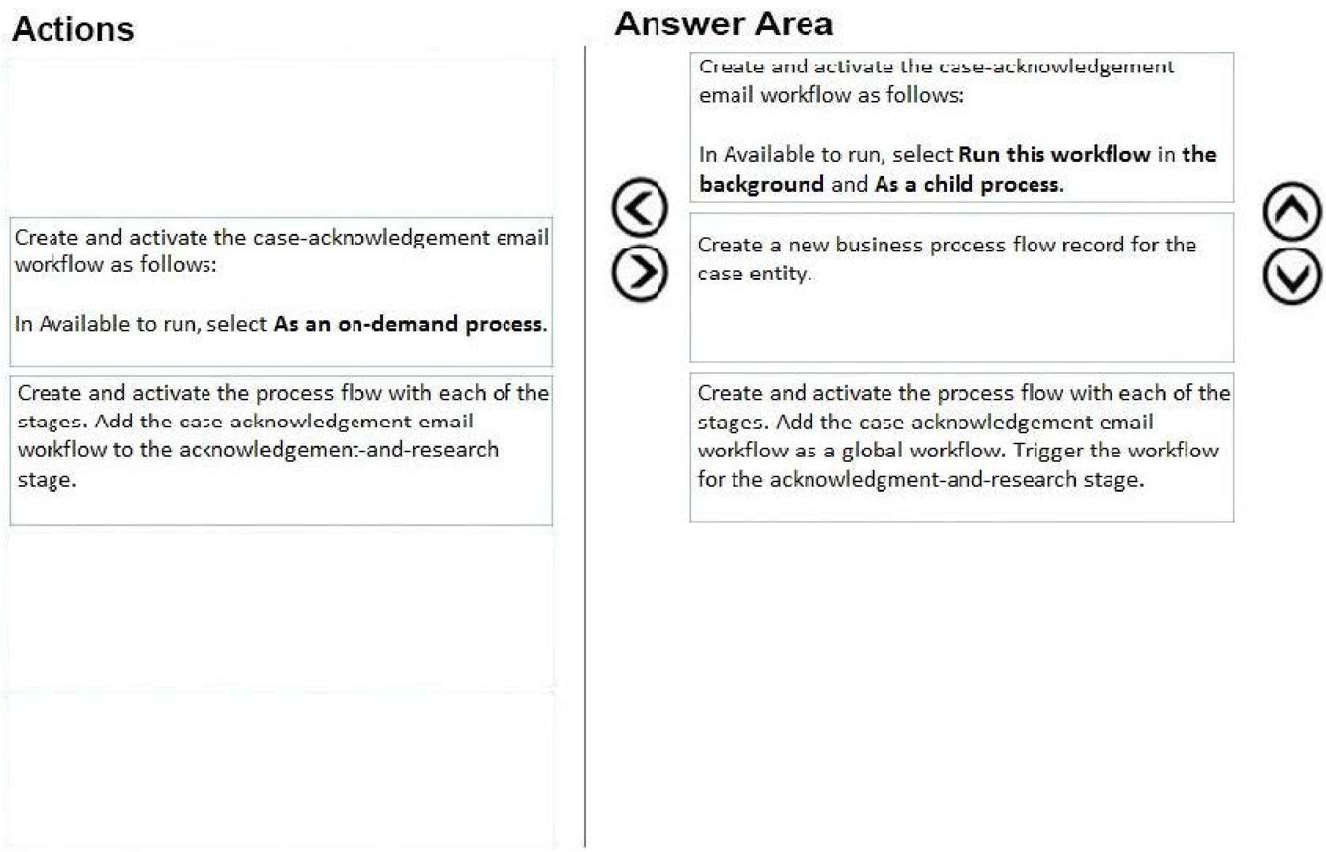
You need to create the required business process flow and components.

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

Select and Place:



Correct Answer:



References: https://docs.microsoft.com/en-us/dynamics365/customer-engagement/customize/create-business-process-flow https://docs.microsoft.com/en-us/dynamics365/customer-engagement/customize/workflow-processes

QUESTION 7

DRAG DROP

You are using Omnichannel for Customer Service.

You need to configure Power Virtual Agents to route calls to a live representative when cases come into Dynamics 365 Customer Service.

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

Select and Place:

Actions

- Create context variables.
- Create a routing rule for a human agent and add the rule to the work stream.
- Create a new topic under Topics.
- Create a routing rule for a virtual agent and add the rule to the work stream.
- Select or create a work stream.
- Select an action.
- Set up name and description.

Answer Area

Correct Answer:

Actions

- Create a new topic under Topics.
- Create a routing rule for a virtual agent and add the rule to the work stream.
- Select an action.
- Set up name and description.

Answer Area

- Select or create a work stream.
- Create context variables.
- Create a routing rule for a human agent and add the rule to the work stream.

QUESTION 8

You set a default entitlement for a customer.

You need to ensure that the default entitlement is automatically associated with a case.

What are two possible ways to achieve this goal? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

A. Create a case.

B. Update the customer, contact, or product field on an existing case.

C. Update the description field on an existing case.

D. Add an activity to an existing case.

Correct Answer: AB

Reference: https://docs.microsoft.com/en-us/dynamics365/customer-service/create-entitlement-define-support-terms-customer https://docs.microsoft.com/en-us/power-platform/admin/system-settings-dialog-box-service-tab

QUESTION 9

HOTSPOT

You are an Omnichannel supervisor for an inbound call center.

The call center\\'s customer service rating has decreased over the past few months.

You need to enable analysis to view real-time customer sentiment.

In which configuration area should you enable each requirement? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

Answer Area

Requirement	Configuration area
Enable change tracking.	Conversation Sentiment Conversation Data Conversation Action Locale
Enable real-time sentiment analysis.	Sales Insights Customer Service Insights Customer Insights Omnichannel Insights

Correct Answer:

Answer Area

Requirement	Configuration area
Enable change tracking.	Conversation Sentiment Conversation Data Conversation Action Locale
Enable real-time sentiment analysis.	Sales Insights Customer Service Insights Customer Insights Omnichannel Insights

QUESTION 10

You manage a Dynamics 365 for Customer Service environment. You create and activate a routing rule. You need to modify the routing rule to a target a queue instead of a user. You navigate to routing rule sets. What should you do first?

A. Use Lookup to specify the Add to queue value.

B. Select Edit to the command bar.

C. Toggle the radio button for Route from user/team to queue.

D. Deactivate the routing rule.

Correct Answer: D

QUESTION 11

You use Dynamics 365 for Customer Service.

You need to create business process flows.

Which three entities can you use? Each correct answer presents part of the solution.

NOTE: Each correct selection is worth one point.

A. Goal

B. Case

C. Letter

D. Social activity

E. Rollup queries

Correct Answer: BCD

QUESTION 12

Your company makes use of Dynamics 365 for Customer Service.

You have configured a customer service business unit as a parent of a call center, a digital response, and an escalation business unit. These business units all have their own queues. Customer service cases are directed to the correct

parties via the queues. You have not amended any security roles.

You have been tasked with making sure that a user in the customer service business unit is able to read queues in both the parent and child business units.

You assign the user the Scheduler security role.

Does the action achieve your objective?

A. Yes, it does

B. No, it does not

Correct Answer: B

QUESTION 13

DRAG DROP

A company is implementing Omnichannel for Customer Service.

You must set up the system to minimize human error and automate actions. The requirements to set up the system are as follows:

1.

Representatives must create a new support record when a customer contacts them through chat.

2.

Knowledge base articles must open in a separate tab when representatives research answers.

3.

When a knowledge base article resolves a customer issue, representatives must send the article to the customer via chat.

You need to set up the macros.

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

Macro types

- Flow connector
- Session connector
- Omnichannel connector
- Productivity automation

Answer Area

Requirement	Macro type
Open new form, and then create a record.	
Open a new application tab.	
Send a knowledge base article in chat.	

Correct Answer:

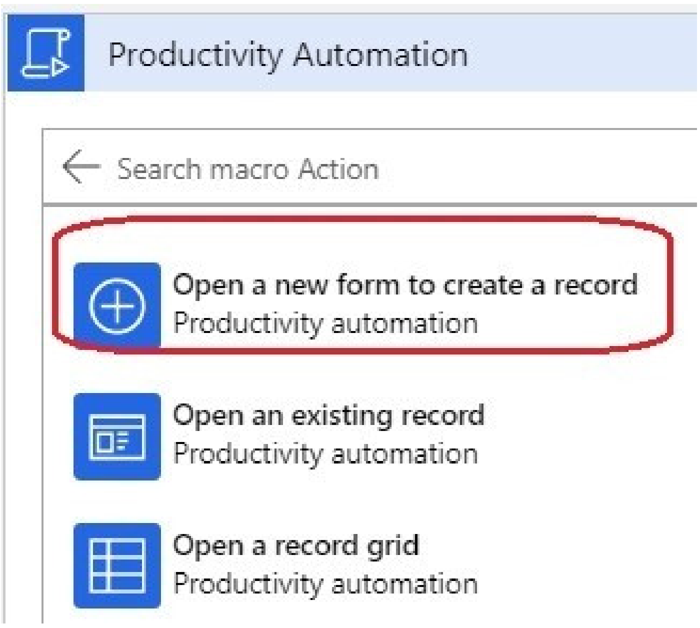
Macro types

Flow connector

Answer Area

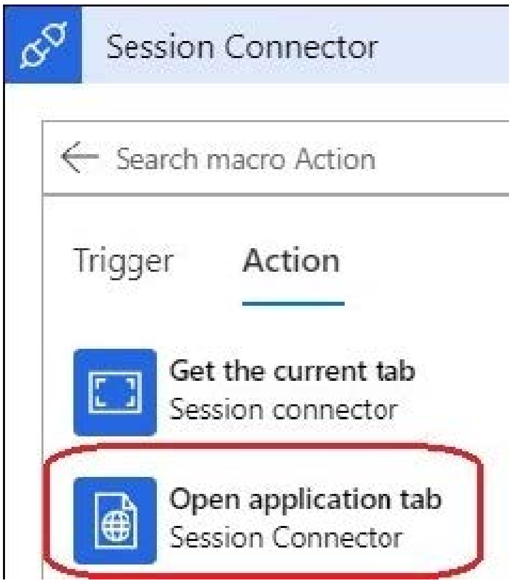
Requirement	Macro type
Open new form, and then create a record.	Productivity automation
Open a new application tab.	Session connector
Send a knowledge base article in chat.	Omnichannel connector

Box 1: Productivity automation Productivity automation As an administrator, you can use the actions any number of times across different macros to automate and perform model-driven app operations.



The following screenshot shows the actions that are explained in the subsequent sections.

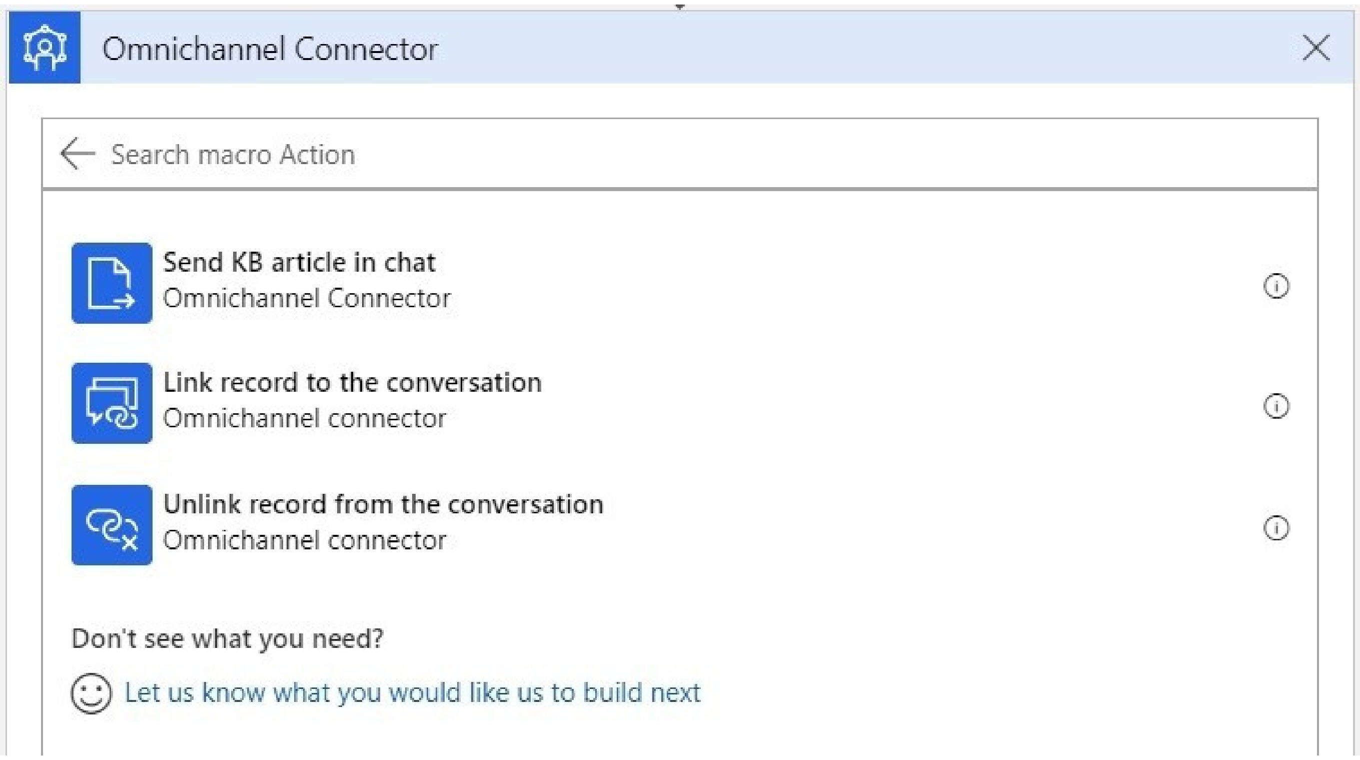
Box 2: Session connector Session connector As an administrator, you can use the actions any number of times across different macros to automate and perform operations related to a session in Customer Service workspace.



Box 3: Omnichannel connector

Omnichannel connector

As an administrator, you can use the actions any number of times across different macros to automate and perform operations related to Omnichannel for Customer Service.



QUESTION 14

What should managers use to perform weekly reviews with case representatives?

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: B

Reference: https://docs.microsoft.com/en-us/dynamics365/customer-service/intraday-agents-insights

QUESTION 15

Your company makes use of Dynamics 365 for Customer Service. You employed as a customer service representative.

You have been given the task of managing several lists of cases.

You want to create a list of cases that are open for a month.

Which of the following actions should you take?

A. You should create a system view.

B. You should create a public view.

C. You should create a personal view.

D. You should create a shared view.

Correct Answer: C

Reference: https://docs.microsoft.com/en-us/dynamics365/customerengagement/on-premises/customize/create-edit-views