



MB-230^{Q&As}

Microsoft Dynamics 365 Customer Service

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QUESTION 1

You create a canvas app to show trending results from a Power Virtual Agents chatbot.

The results must be viewable on the Dynamics 365 Customer Service workspace home page.

You need to add the survey results canvas app to the Customer Service workspace.

What should you do?

- A. Add an iFRAME component to the main home page form and reference the canvas app name
- B. Share the canvas app
- C. Add the canvas app to the sitemap
- D. Create a solution in the environment and add the canvas app to the solution
- E. Add the canvas app component to the main home page form and reference the canvas app name

Correct Answer: A

Explanation: <https://nishantrana.me/2020/11/12/embedding-canvas-app-in-an-iframe- inside-dynamics-365/>

QUESTION 2

DRAG DROP

You need to ensure that the company can support the customers with coffee maker issues remotely.

Which features should you use? To answer, drag the appropriate features to the correct options. Each feature 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:

Features	Answer Area
IOT Hub	
Service bus queue	
Logic Apps	

Option	Feature
Devices are securely connected to	
Messages flow back and forth	
Cases open when a message is detected	



Correct Answer:

Features

Answer Area**Option**

Devices are securely connected to

Messages flow back and forth

Cases open when a message is detected

Feature

IOT Hub

Logic Apps

Service bus queue

QUESTION 3**DRAG DROP**

A company uses Dynamics 365 Customer Service.

A user is configuring IoT devices to record specific types of information, such as temperature, humidity, and air flow. Several types of devices require configuration for pre- set commands and ease of administration.

You need to configure the devices to generate the correct recordings.

NOTE: Each correct selection is worth one point.

Select and Place:



Types

Device category	Command
Property definition	Command definition

Answer Area

Requirement

Type

Set up temperature IoT devices.

Set up reading parameters.

Set up temperature values.

Correct Answer:



Types

	Command

Answer Area

Requirement

Set up temperature IoT devices.

Set up reading parameters.

Set up temperature values.

Type

Device category

Property definition

Command definition

QUESTION 4

You are implementing Omnichannel for Customer Service for a company.

The company has set up dedicated teams to handle inquiries from different social platforms. Each team member specializes in a specific product line from the company. However, the team members must be able to pick up any inquiry coming

into the team.

You need to configure the system.

Which two components should you configure? Each correct answer presents part of the solution.

NOTE: Each correct selection is worth one point.

- A. Create a work item trigger
- B. Turn on Agent Affinity
- C. Create a Parent Child attribute
- D. Create a routing rule
- E. Turn on a custom listener



Correct Answer: AD

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

QUESTION 5

DRAG DROP

You need to identify the productivity tools to use for the agents.

Which tools should you use? To answer, move the appropriate tools to the correct requirements. You may use each tool once, more than once, or not at all. You may need to move the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

Select and Place:

Productivity tools		Productivity tools		Requirements		Tools
Agent scripts				Shows list of tasks for an agent to follow.		
Macros				Automates opening a case form.		
Quick replies						

Correct Answer:

Productivity tools		Productivity tools		Requirements		Tools
				Shows list of tasks for an agent to follow.		Agent scripts
				Automates opening a case form.		Macros
Quick replies						

QUESTION 6

You need to configure the system to meet the workspace requirements for case representatives. Which role should you assign to case representatives?

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

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: C

QUESTION 7

Customer service representatives are not able to manually add service-level agreements (SLAs) to a record.

You need to enable on-demand SLAs.

What should you do?

- A. Configure the scope of the workflow
- B. Publish the on-demand SLA
- C. Activate the SLA
- D. Request an administrator to add the SLA field to the entity form

Correct Answer: D

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

QUESTION 8

A company uses Dynamics 365 Customer Service. A client purchases a premium support package that allows six support incidents over two years.

You need to set up support entitlement enforcement.

Which three attributes should you configure? Each correct answer presents a part of the solution.

NOTE: Each correct selection is worth one point.

- A. Specify the remaining item
- B. Specify the total term



- C. Specify the end date
- D. Set the Restrict based on entitlement terms value
- E. Specify the service-level agreement (SLA)

Correct Answer: BCD

Reference: <https://docs.microsoft.com/en-us/dynamics365/customer-service/create-entitlement-define-support-terms-customer>

QUESTION 9

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

You want to make sure that an escalation is activated in support by VoC survey responses.

Which of the following actions should you take?

- A. You should make use of the VoC

Correct Answer: A

Reference: <https://ph.microsoftcrmportals.com/knowledgebase/article/KA-01022/en-us>

QUESTION 10

HOTSPOT

A company uses Dynamics 365 Customer Service. The company purchases Omnichannel for Customer Service.

The company wants the following requirements implemented without the need to license additional software:

The system must automatically ask questions before the chat begins.

Credit card information that a customer enters in a chat must not be visible to the agent.

You need to configure the options to meet the requirements.

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

NOTE: Each correct selection is worth one point.

Hot Area:



Answer Area

Requirement

Option

Automatic questions

▼

Pre-chat survey
Power Virtual Agents
Customer Voice
SMS channel

Credit card information

▼

Data encryption
Data masking rule
Authentication settings
Communication Panel

Correct Answer:



Answer Area

Requirement

Option

Automatic questions

▼

Pre-chat survey
Power Virtual Agents
Customer Voice
SMS channel

Credit card information

▼

Data encryption
Data masking rule
Authentication settings
Communication Panel

Reference: <https://docs.microsoft.com/en-us/dynamics365/customer-service/configure-pre-chat-survey>

<https://docs.microsoft.com/en-us/dynamics365/customer-service/data-masking-settings>

QUESTION 11

DRAG DROP

A customer has a Customer Service deployment.

The customer needs to implement macros.

You need to identify the security roles that are required to configure and use macros.

Which security roles are required? To answer, move the appropriate security roles to the correct requirements. You may use each security role once, more than once, or not at all. You may need to move the split bar between panes or scroll to

[view content](#)



NOTE: Each correct selection is worth one point.

Select and Place:

Security Roles

Customer Service app access

Omnichannel administrator

Productivity tools administrator

Productivity tools user

Sequence manager

Security Roles**Requirements**

Configure macros.

Use macros.

Security roles

Correct Answer:

Security Roles

Customer Service app access

Omnichannel administrator

Sequence manager

Security Roles**Requirements**

Configure macros.

Use macros.

Security roles

Productivity tools administrator

Productivity tools user

QUESTION 12

You are configuring a queue in Omnichannel for Customer Service for a call center.

You need to complete the queue configuration using the minimal number of actions.

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

NOTE: Each correct selection is worth one point.

- A. Configure the mailbox for the queue
- B. Set the record creation and update rules for the queue
- C. Set the queue priority for the queue
- D. Enable the queue for auto work distribution

Correct Answer: CD



Reference: <https://docs.microsoft.com/en-us/dynamics365/customer-service/queues-omnichannel>

QUESTION 13

A trucking company uses a custom table named Leased Truck in Dynamics 365 Customer Service to capture leasing details. The company is implementing Connected Customer Service for Azure IoT Hub to track the leased trucks. You need

to configure the custom table Leased Truck for IoT integration.

Which two methods achieve the goal? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

- A. Set the relationship in the Power Platform admin center.
- B. Create a one-to-many relationship from the Leased Truck table to the IoT Alert table.
- C. Call the IoT - Register Custom Entity action to associate a Leased Truck record with an existing IoT device.
- D. Enable connections to the Leased Truck table.

Correct Answer: CD

IOT enabling an entity type

Dynamics 365 entities can be associated to IoT entities so that within Dynamics 365 they can participate in IoT-related business processes and analyses. There are two methods of "IoT enabling" a Dynamics 365 entity; you can:

*

(D) Programmatically form an association through the standard Dynamics 365 Connection entities capability. You can alternatively accomplish this same association through the administration UI; for more information, see [Create connections to view relationships between records](#).

*

(C) Call the IoT ?Register Custom Entity action to associate an entity with an existing or new IoT Device.

Reference: <https://docs.microsoft.com/en-us/dynamics365/customer-service/cs-iot-extend-connected-customer-service-solutions>

QUESTION 14

You are responsible for designing surveys via Voice of the Customer (VoC).

You want to make sure that the design allows for questions to be shown or hidden according to answer selected.

You include the Piping feature in the design.

Does the action achieve your objective?

- A. Yes, it does



B. No, it does not

Correct Answer: A

Reference: <https://www.inogic.com/blog/2016/10/display-survey-questions-conditionally-for-voice-of-customer-in-dynamics-crm-2016/>

QUESTION 15

Your company uses Dynamics 365 Customer Service. You create the following support offerings. Customers must choose one of the three offerings.

1.

Email only

2.

Phone only

3.

Half phone and half email

You allocate 50 cases to each support offering.

You need to create the entitlement with terms that adhere to the support offerings.

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 one entitlement template that includes the three different terms. Apply the template to the customer, and then remove the terms that do not apply.

B. Create a new entitlement for each new support offering for the customer, with terms equal to 25 phone calls and 25 emails.

C. Create a new entitlement for each new support offering for the customer, with terms equal to 50 phone calls and 50 emails.

D. Create different entitlement templates for each set of terms. Apply the appropriate template to the customer.

E. Create three entitlement templates with terms for 50 calls and 50 emails. Apply the template to the customers as they sign the support offering.

Correct Answer: CE

Note: Quickly create other entitlements prefilled with the basic information like the start and end date, service level agreement (SLA), allocation type, and total term by using an entitlement template in Dynamics 365 Customer Service. For

example, create a template for a standard entitlement, and then apply this template for every standard customer in your organization.



Template information include:

Total Term: Specify the total amount of support the customer is entitled to with respect to the allocation type. For example, if the allocation type is number of cases and you specify 100 in Total term, then the customer is entitled to support up

to 100 cases.

Reference:

<https://docs.microsoft.com/en-us/dynamics365/customer-service/create-entitlement-define-support-terms-customer>

<https://docs.microsoft.com/en-us/dynamics365/customer-service/set-up-entitlements-templates>

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