Vendor: Microsoft

Exam Code: MB-230

Exam Name: Microsoft Dynamics 365 for Customer Service

Version: DEMO

QUESTION 1
Case Study 1 - Humongous Insurance

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

- Health maintenance organization (HMO)
- Preferred-provider organization (PPO)
- 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
- Humongous Insurance has three departments to handle claim types: HMO, PPO, and Gold.
- The company uses handwritten forms to send claims information to the correct department.
- Each department maintains a workbook to record calls received.

Requirements. Support desk
- Configure the system to track the number of insurance claims filed each year.
- Categorize claims by type as they are opened.
- Configure the system to track staff responsiveness to service-level agreements (SLAs).
- Ensure that business hours reflect the hours that support staff are scheduled.

Requirements. Case handling
- All new cases must be automatically placed into a queue based on insurance type after the type is selected.
- All insurance types need to be automatically moved to the proper queue when the subject is picked.
- All cases must be created and closed immediately when received.
- The status reason must be set to Email Sent or Phone Call.
- Information must be restricted by insurance and phone call type.
- Managers must be alerted when customers reach their limit of 25 cases for the year.
- Changes to cases must not be counted against entitlements until the case is closed.

Requirements. Disputes
- Claim disputes must be categorized as low priority.
- The status for all disputed cases must be set to Review by a Manager before a disputed case may be closed.

You need to search for answers to customer claims.

Which type of search should you perform?

A. Timeline
B. Quick Find
C. Related
D. Detail
E. Case Relationships

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

QUESTION 2
Case Study 2 - Lamna Healthcare

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.

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

What should you configure?

A. Services

B. Queues
C. Facilities/equipment
D. Activities

Answer: A
Explanation:
https://docs.microsoft.com/en-us/dynamics365/customer-service/basics-service-service-scheduling

QUESTION 3
Case Study 3 - The Phone Company

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
- New cases must automatically route to the correct support group by phone type or new purchase group without requiring custom code.
- The system must automatically create a case when email is received by companies that are not in the system.
- The system must automatically send a response to an email sender upon case creation for new orders, but not for service records.
- Users must be able to initiate routing for manually created cases.
- 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.
- Main cases must not be closed until all the sub-cases are closed.
- 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.
- When importing from the old system, old cases do not need to be routed to the correct support group.

Knowledge base
- Users must be able to search the knowledge base when opening a new case form or when checking on cases.
- Users must be able to use relevant searches and include any customer entities.

You need to create the queue for cases.

What type of queue should you create?

A. Teams
B. Public
C. Product
D. Private
E. Service

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

QUESTION 4
Case Study 4 - Lamna Healthcare

Background
Lamna Healthcare Company has a call center for the city. They receive roughly 5,000 calls a day on health issues.
They have the following three departments that take calls daily:
- Chronic illnesses
- Flu-type illnesses
- Geriatric illnesses

There is a fourth area that monitors for miscellaneous issues.
They are implementing Dynamics 365 Customer Service.

Requirements. Queues
A queue has to be set up for each department.
Emails must automatically be routed to the appropriate queue.
Miscellaneous queues must be visible to everyone.
The other queues must be visible only to the appropriate department. If a case is open more than 30 days, the case must automatically be routed to the supervisor. There must be a button on the queue list screen to route a case to a supervisor if requested.

Requirements. Visualizations
Support representatives must have a real-time view of cases assigned to them, including the status of each case.
Support representatives must be able to see a graphic view of cases by customer that are assigned to them.

Requirements. Knowledge Base
Support representatives must use the knowledge base first to try to solve issues. Support representatives must be able to reference the knowledge base when it is used to resolve the case.
The knowledge base article that is used to resolve a case must always be sent to the customer. If the answer is not in the knowledge base, a support representative needs to create a knowledge base article.

You need to add the confirmation step for cases.

What should you edit?

A. Common Data Service
B. Business process now
C. Workflow
D. Power Automate
E. Environment

Answer: B
Explanation:
A confirmation section must be added before the resolve section.
Example: Add an on-demand action to a business process flow. The Dynamics 365 (online), version 9.0 update introduces a business process flow feature: business process flow automation with Action Steps. You can add a button to a business process flow that will trigger an action or workflow.

Reference:
https://docs.microsoft.com/en-us/power-automate/create-business-process-flow#add-an-on-demand-action-to-a-business-process-flow

QUESTION 5
You implement the Unified Service Desk (USD). You plan to implement a window navigation rule. Which two statements are true? Each answer represents a complete solution.

A. You must populate the form and entity or URL fields for specific rules.
B. Rules are evaluated based on the order number,
C. You must use the display name to reference the entity in the rule.
D. You must configure default rules so that they are evaluated first

Answer: BD
Explanation:

Name	This is the name of the window navigation rule.
Order	This is the numerical order of the rule that controls the order of execution. The smaller value here matches first. More specific rules should have a smaller value while more general or default rules should have larger values.
From	Select the hosted control from where the navigation or routing request originates.

QUESTION 6
Hotspot Question

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.

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

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

Explanation:
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).

Reference:
https://docs.microsoft.com/en-us/power-apps/maker/portals/portal-templates
https://docs.microsoft.com/en-us/dynamics365/supply-chain/sales-marketing/customer-portal-overview
https://readyxrm.blog/2019/07/04/dynamics-365-customer-self-service-powerapps-portals-creating-a-case-on-behalf-of-another-account/

QUESTION 7
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.

Answer: CD
Explanation:
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 8
A company uses Omnichannel for Customer Service.

The company wants to configure Power Virtual Agents within Omnichannel to have automatic answers when a customer starts a chat session.

You need to set up the prerequisites for the Power Virtual Agents.

Which three technologies should you set up? Each correct answer presents part of the solution.

NOTE: Each correct selection is worth one point.

A. Work stream
B. Queues
C. Azure Application ID
D. Chat widget
E. Chatbot

Answer: BCE
Explanation:
CE: Prerequisites
Before you integrate Power Virtual Agents bots in Omnichannel for Customer Service, check the following:
* Azure Application ID -You'll need an application registered on the Azure portal before connecting to Omnichannel for Customer Service.
* Bot -You must have a pre-configured bot that can integrate with Omnichannel for Customer Service.
* Product licenses -You need a product license for Power Virtual Agents
* Role -You must have the Omnichannel administrator role.

B: In Omnichannel Administration, after the Power Virtual Agents bot is created and configured to work with Omnichannel for Customer Service, you can configure it to hand off conversations to queues. To receive incoming messages, you must add the bot to at least one queue.

Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-service/configure-bot-virtual-agent

QUESTION 9
You create a Power Virtual Agents chatbot. The chatbot includes Power Automate flows. You are not a system administrator.

Users in your organization must collaborate to develop the chatbot.

You attempt to share the chatbot by adding user email addresses and assigning them Manager, Power Automate User, and Transcript Viewer permissions on the bot. The Send an email invitation to new users option is disabled.

Sharing of the chatbot fails.

You need to use the principle of least privilege to share the chatbot with users for collaboration.

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

NOTE: Each correct selection is worth one point.

A. Assign the users the Environment Maker security role.
B. Ensure that a System Administrator assigns the users the Environment Maker security role.
C. Share the Power Automate flows.
D. Enable Send an email invitation to new users and re-share the chatbot.
E. Configure a custom context variable for the chatbot.

Answer: BC
Explanation:
B: Insufficient environment permissions
Users in the environment must have the Environment maker security role before a bot can be shared with them.
System administrators of the environment need to assign the Environment maker security role to the user before you share the bot.
C: Share Power Automate flows used in a bot
You can add actions to a bot using flows in Power Automate; however, flows in a bot aren't automatically shared with other users when sharing a bot.
Users who don't have access to the shared flow can still run it by using the test bot canvas.
To let other users edit or add flows you'll need to share them in Power Automate. You can open flows directly from the topic where the flow is used.

Reference:
https://docs.microsoft.com/en-us/power-virtual-agents/admin-share-bots
https://docs.microsoft.com/en-us/dynamics365/customerengagement/on-premises/customize/create-site-map-app

QUESTION 10
You use multiple workspaces within Dynamics 365 Customer Service insights.

You need to switch workspaces.

What should you do?

A. Select Dashboard filters and then select a filter.
B. Navigate to https://csi.ai.dynamics.com and then share a workspace.
C. Select My workspaces and then select a workspace.
D. Select View and then select a workspace view.

Answer: C
Explanation:
As an owner of a workspace, you launch sharing of a workspace by going to the My workspaces panel, hovering your mouse over the workspace name, and then selecting the share icon to open a dialog. From there, you add any users from your company's Azure Active Directory. Any viewers will receive an email notifying them with a link to the workspace.

Reference:
https://cloudblogs.microsoft.com/dynamics365/it/2019/06/13/new-in-dynamics-365-customer-service-insights-share-workspaces-train-ai-model-with-renamed-topics/

QUESTION 11
You are configuring Dynamics 365 Customer Service workspaces.

Users want to use minimal keystrokes and easy-to-use navigation to open multiple sessions.

You need to configure the simplified navigation experience.

What should you do?

A. Run the simplified navigation settings code in the browser console window within Dynamics 365

Customer Service.

B. Enable the appropriate features in the Power Platform admin center of the Dynamics 365 Customer Service environment.
C. Configure the settings in the Agent Experience area of the Customer Service Hub.
D. Configure the settings in the administration console.

Answer: D
Explanation:
Customize Customer Service workspace
You can use your browser's developer tools to customize some aspects of the Customer Service workspace.

Turn on the enhanced multisession workspace (preview) With Customer Service workspace open, press the F12 key to open the developer tools window. In the console window, type the following command and press Enter:
Xrm.Utility.getGlobalContext().saveSettingValue("msdyn_MultiSessionLayoutImprovements",true)
Refresh the app page.

Note: If you turn on the enhanced multisession workspace, the enhanced experience applies in both Customer Service workspace and Omnichannel for Customer Service.

Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-service/csw-overview#turn-on-the-enhanced-multisession-workspace-preview
https://docs.microsoft.com/en-us/dynamics365/customer-service/csw-overview#simplify-navigation-in-customer-service-workspace

QUESTION 12
You are describing Power Virtual Agents to executives at a company.

The executives want to know which features are available out of the box.

You need to describe these features.

Which three features are available? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

A. Monitor bot conversations in real time.
B. Assign cases to specific users.
C. Escalate to a live person.
D. Use bots in post-chat surveys through routing rules.
E. Display a view of customer cases to users.

Answer: ACE
Explanation:
A: Smart assist is an intelligent assistant that provides real-time recommendations to agents, helping them take actions while interacting with customers. It allows organizations to build a custom bot and plug-in to their environment. These custom bots interpret conversations in real time and provide relevant recommendations such as knowledge articles, similar cases, and next-best steps to the agent's user interface.

C: With Power Virtual Agents, you can hand off conversations to live agents seamlessly and contextually.

When you hand off a conversation, you share the full history of the conversation (the context) as well as all user-defined variables. Having access to this context means live agents that are using any connected engagement hub can be notified that a conversation requires a live agent, see the context of the prior conversation, and resume the conversation.

Reference:
https://docs.microsoft.com/en-us/dynamics365/app-profile-manager/smart-assist
https://docs.microsoft.com/en-us/power-virtual-agents/advanced-hand-off

QUESTION 13
You are creating a Power Virtual Agents chatbot to handle common customer inquiries.

A manager reports that some inquiries are not routing to the appropriate customer service representatives. You observe that one node is inactive.

You need to determine why the node is inactive.

What should you use?

A. Maker portal
B. Supervisor dashboard
C. Test bot pane
D. Topic checker

Answer: D
Explanation:
https://docs.microsoft.com/en-us/power-virtual-agents/authoring-topic-management

QUESTION 14
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

Answer: CD
Explanation:
https://docs.microsoft.com/en-us/dynamics365/customer-service/queues-omnichannel