

- **Vendor: Microsoft**
- **Exam Code: MB-230**
- **Exam Name: Microsoft Dynamics 365 for Customer Service**
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QUESTION 127

**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.

Requirements. System and resources

- Each employee must use the system.
- Case managers must be users in the system but must not be available for the scheduling rotation or manually assigned.
- Patients must be offered at least three alternative times to schedule an appointment.

Requirements. Cases

- The system must support live chats, texting, and Twitter.
- Case representatives must be able to chat, text, and tweet without exiting the system they use to track calls.
- Case representatives must be able to chat live only with customers whose calls are routed or assigned to them.
- Managers must be able to monitor all communication as well as add or delete quick replies.
- Customer satisfaction representatives must be able to read agent scripts and workflows.
- 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.
- There are two type of queues: regular and escalated.
- Tickets must be routed to the most qualified representative for the illness.

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<https://www.braindump2go.com/mb-230.html>

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

Requirements. Chat escalation process

- Each division must have one manager for escalations.
- 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.
- Only escalations must go to the chat bot.
- You must create two types of Omnichannel queues: regular and escalated.
- Only managers must be able to access the Omnichannel Insights dashboard.

Requirements. Managers

- Managers must be able to review weekly productivity reports for representatives by using Omnichannel Insights dashboards.
- Managers must be able to monitor patient moods during patients' conversations with representatives.
- Managers must be able to determine whether a patient is feeling negative during a live chat with a representative.

Requirements. Appointments

- Representatives must be able to schedule appointments and see everyone's free/busy time during their scheduled working hours.
- Appointments must be scheduled by representatives in open time slots for nurses and doctors.
- Nurses and doctors must be booked for 30-minute time slots.
- Patients must be offered at least three alternative times to schedule an appointment.

Requirements. Analytics

- You must implement Customer Insights to keep track of how well representatives are managing customers' requests.
- Analytics must be viewable only in the production environment.
- You must ensure that only escalation managers can create workspaces and control access to workspaces
- Case representatives must be rated on knowledge of their primary specialty and their backup specialty.
- Case representatives must only be able to view workspaces.
- Managers must be able to review dashboards in the Chat channel to ensure that case representatives are meeting their objectives.

Hotspot Question

You need to select the feature for each parameter.

Which feature should you use for each parameter? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Answer Area

Parameter	Feature
Phone Representatives	<input type="text"/> Service activities Schedule board Work hours
New Year's Day	<input type="text"/> Customer service calendar Holiday calendar Business closures
Business Hours	<input type="text"/> Customer service calendar Holiday calendar Business closures

Answer:

Answer Area

Parameter	Feature
Phone Representatives	<div style="border: 1px solid black; padding: 2px;"> <div style="border-bottom: 1px solid black; padding: 2px;">▼</div> <div style="padding: 2px;">Service activities</div> <div style="background-color: #d9ead3; padding: 2px;">Schedule board</div> <div style="padding: 2px;">Work hours</div> </div>
New Year's Day	<div style="border: 1px solid black; padding: 2px;"> <div style="border-bottom: 1px solid black; padding: 2px;">▼</div> <div style="padding: 2px;">Customer service calendar</div> <div style="background-color: #d9ead3; padding: 2px;">Holiday calendar</div> <div style="padding: 2px;">Business closures</div> </div>
Business Hours	<div style="border: 1px solid black; padding: 2px;"> <div style="border-bottom: 1px solid black; padding: 2px;">▼</div> <div style="background-color: #d9ead3; padding: 2px;">Customer service calendar</div> <div style="padding: 2px;">Holiday calendar</div> <div style="padding: 2px;">Business closures</div> </div>

Explanation:

<https://docs.microsoft.com/en-us/dynamics365/customer-service/create-operating-hours>

QUESTION 128

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Requirements. System and resources

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- Case representatives must only be able to view workspaces.
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Hotspot Question

You need to select which setting needs to be configured for each setup.

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

NOTE: Each correct selection is worth one point.

Answer Area

Setup	Setting
Ticket routing	<div style="border: 1px solid gray; padding: 2px;"> <input type="text" value=""/> </div> <div style="border: 1px solid gray; padding: 2px;"> Workstream Rating Model Bookable Resource Characteristic Type Resource Category </div>
Representative specialty	<div style="border: 1px solid gray; padding: 2px;"> <input type="text" value=""/> </div> <div style="border: 1px solid gray; padding: 2px;"> Workstream Rating Model Bookable Resource Characteristic Type Resource Category </div>
Spanish	<div style="border: 1px solid gray; padding: 2px;"> <input type="text" value=""/> </div> <div style="border: 1px solid gray; padding: 2px;"> Workstream Rating Model Bookable Resource Characteristic Type </div>

Answer:

Answer Area

Setup	Setting
Ticket routing	<div style="border: 1px solid gray; padding: 2px;"> <input type="text" value=""/> </div> <div style="border: 1px solid gray; padding: 2px;"> Workstream Rating Model Bookable Resource Characteristic Type Resource Category </div>
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Spanish	<div style="border: 1px solid gray; padding: 2px;"> <input type="text" value=""/> </div> <div style="border: 1px solid gray; padding: 2px;"> Workstream Rating Model Bookable Resource Characteristic Type </div>

Explanation:

<https://docs.microsoft.com/en-us/dynamics365/customer-service/create-workstreams>

<https://docs.microsoft.com/en-us/dynamics365/customer-service/enable-skill-routing-create-rating-model>

QUESTION 129

Hotspot Question

You need to configure each escalation scenario.

Which configuration should you use for each scenario? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Answer Area

Scenario	Configuration
Escalation workstreams	<div style="border: 1px solid #ccc; padding: 2px;"> <div style="background-color: #f0f0f0; padding: 2px; border-bottom: 1px solid #ccc;"> ▼ </div> <div style="padding: 2px;"> <p>One routing rule that includes both escalations and regular tickets</p> <p>Two routing rules: one for escalations and one for regular tickets</p> <p>Code snippet to engage a bot</p> <p>Bot channel from the Microsoft Azure portal</p> </div> </div>
Escalation handling tool	<div style="border: 1px solid #ccc; padding: 2px;"> <div style="background-color: #f0f0f0; padding: 2px; border-bottom: 1px solid #ccc;"> ▼ </div> <div style="padding: 2px;"> <p>Power Virtual Agents</p> <p>Unified Service Desk</p> <p>Customer Service Insights</p> <p>Customer Insights</p> </div> </div>

Answer:

Answer Area

Scenario	Configuration
Escalation workstreams	<div style="border: 1px solid #ccc; padding: 2px;"> <div style="background-color: #f0f0f0; padding: 2px; border-bottom: 1px solid #ccc;"> ▼ </div> <div style="padding: 2px;"> <p>One routing rule that includes both escalations and regular tickets</p> <p>Two routing rules: one for escalations and one for regular tickets</p> <p>Code snippet to engage a bot</p> <p style="background-color: #d9ead3;">Bot channel from the Microsoft Azure portal</p> </div> </div>
Escalation handling tool	<div style="border: 1px solid #ccc; padding: 2px;"> <div style="background-color: #f0f0f0; padding: 2px; border-bottom: 1px solid #ccc;"> ▼ </div> <div style="padding: 2px;"> <p style="background-color: #d9ead3;">Power Virtual Agents</p> <p>Unified Service Desk</p> <p>Customer Service Insights</p> <p>Customer Insights</p> </div> </div>

Explanation:

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

QUESTION 130

You are a system administrator for Dynamics 365 for Customer Service.

All child cases must inherit the product, customer name, case title, and case type from the parent case. Parent cases must not be closed until all child cases are closed.

You need to configure cases.
What should you do?

- A. Validate that customer and case title fields have not been removed as fields that child cases inherit from parent cases.
Add product and case-type fields to the list.
Set the closure preference setting to Don't allow parent case closure until all child cases are closed.
- B. On the case entity, update the Parent case-Child case 1:N relationship field mapping to include the fields.
Create a business rule on the case entity to prevent the parent from closing if it has one or more open child cases.
- C. Create a business rule.
- D. Validate that customer and case title fields have not been removed as fields that child cases inherit from the parent cases.
Add product and case-type fields to the list.
The closure preference setting does not need to be changed.
This is default behavior.

Answer: A

Explanation:

<https://docs.microsoft.com/en-us/dynamics365/customer-service/define-settings-parent-child-cases>

QUESTION 131

A company uses Dynamics 365 Customer Service.

You are configuring the advanced similarity rules. You create a similarity rule on cases and put an exact match for the Modified On field in the Match Fields tab.

You test the rule and discover that exact matches do not appear.

You need to determine why the rule is not working.

What are two possible reasons why the rule is not working? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

- A. A Power Automate flow was not created.
- B. The similarity rule is deactivated.
- C. The security role is not set to run the similarity rule.
- D. The similarity rule was not published.
- E. The Modified On field is not set to searchable in the customization of the case entity in the solution.

Answer: BE

Explanation:

<https://docs.microsoft.com/en-us/dynamics365/customer-service/suggest-similar-cases-for-a-case>

QUESTION 132

You are a help desk representative for an organization using Dynamics 365 Customer Service.

Users need to search within the system for similar cases. None of the out-of-the-box settings have been changed.

You need to determine which search features are available for use by default.

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

NOTE: Each correct selection is worth one point.

- A. Advanced Find
- B. Quick Find
- C. Relevance Search
- D. Full-text Quick Find

Answer: AB



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