

# MB-230<sup>Q&As</sup>

Microsoft Dynamics 365 Customer Service

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**QUESTION 1**

DRAG DROP

You need to set up users with permissions to use the digital messaging channels.

Which role should you assign to each user? To answer, drag the appropriate roles to the correct groups of users. Each role 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.

Select and Place:

Roles	Answer Area	Role
Omnichannel supervisor	Case managers	
Omnichannel agent	Case representatives	
Productivity tools user	Customer satisfaction representatives	
Productivity tools administrator		

Correct Answer:

Roles	Answer Area	Role
	Case managers	Omnichannel supervisor
	Case representatives	Omnichannel agent
Productivity tools administrator	Customer satisfaction representatives	Productivity tools user

Box 1: Omnichannel supervisor

Case managers schedule shifts and are a point of escalation.

Omnichannel supervisor: Required for performing supervisor tasks. Businesses need to monitor and manage the efficiency levels of agents in their ongoing conversations with customers. The enhanced supervisor experience provides

supervisors with timely insights and metrics on the efficiency of the service delivery of agents and opportunities to help agents deliver better support to customers. In this enhancement to the supervisor experience in Omnichannel for

Customer Service, supervisors can:

Drill down to specific agents and look at their operational metrics.

Manage agent availability remotely.

Box 2: Omnichannel agent

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.

Omnichannel agent: Required for performing agent tasks. As an Omnichannel agent, you can use queues to manage the work items that are assigned to you via queues. Therefore, you can focus on the tasks at hand and ensure better

customer service. The application empowers you to work on simultaneous conversations with multiple customers. You get a holistic view of a customer's data and can see the details of the customer's previous interactions. In this way, you can

be sure that you have all the available information that you might need to resolve the customer's issue.

Box 3: Productive tools user

Customer satisfaction representatives monitor all activity and ensure that there is a uniform process for all calls.

Productivity tools user: Required by users of Dynamics 365 Productivity Tools. Agent productivity tools use intelligence and automation to enable agents to find answers to customer questions and help resolve customer issues quickly, thereby

improving satisfaction in service delivery.

Incorrect:

Not Productivity tools administrator:

Productivity tools administrator: Required by administrator users of Dynamics 365 Productivity Tools.

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## QUESTION 2

You use Dynamics 365 for Customer Service.

You need to merge cases.

What is the outcome for the merge process? To answer, select the appropriate configuration in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

## Answer Area

Merge object	Outcome
Duplicate cases	<div style="border: 1px solid gray; padding: 2px;"><div style="background-color: #cccccc; padding: 2px; text-align: right;">▼</div><div style="padding: 2px;">Merged and carceled</div><div style="padding: 2px;">Merged and resolved</div><div style="padding: 2px;">Merged and deleted</div></div>
Open activities	<div style="border: 1px solid gray; padding: 2px;"><div style="background-color: #cccccc; padding: 2px; text-align: right;">▼</div><div style="padding: 2px;">Mcvcd to the merged case</div><div style="padding: 2px;">Canceled</div></div>

Correct Answer:

## Answer Area

Merge object	Outcome
Duplicate cases	<div style="border: 1px solid gray; padding: 2px;"><div style="background-color: #cccccc; padding: 2px; text-align: right;">▼</div><div style="padding: 2px; background-color: #d9ead3;">Merged and carceled</div><div style="padding: 2px;">Merged and resolved</div><div style="padding: 2px;">Merged and deleted</div></div>
Open activities	<div style="border: 1px solid gray; padding: 2px;"><div style="background-color: #cccccc; padding: 2px; text-align: right;">▼</div><div style="padding: 2px; background-color: #d9ead3;">Mcvcd to the merged case</div><div style="padding: 2px;">Canceled</div></div>

### QUESTION 3

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.

Correct Answer: BE

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

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#### QUESTION 4

You need to consider the underlined segment to establish whether it is accurate.

Routing rules must be used to automate the process of adding cases to a queue.

- A. No adjustment required.
- B. Business rules
- C. Business process flow
- D. Similarity rules

Correct Answer: A

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#### QUESTION 5

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

You want to make sure that clients who currently receive surveys are able to unsubscribe when they no longer want to receive them.

You set the Allow unsubscribe setting to Yes.

Does the action achieve your objective?

- A. Yes, it does
- B. No, it does not

Correct Answer: A

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Reference: <https://www.inogic.com/blog/2018/02/exploring-the-unsubscribe-survey-option-in-voice-of-customer-in-dynamics-365-crm/>

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