

MB-230^{Q&As}

Microsoft Dynamics 365 Customer Service

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QUESTION 1

Your company makes use of Dynamics 365 Customer Service with the default settings unchanged.

You want to find like cases in the system using a default search feature.

You make use of Full-text Quick Find.

Does the action achieve your objective?

A. Yes, it does

B. No, it does not

Correct Answer: A

Reference: <https://docs.microsoft.com/en-us/dynamics365/customerengagement/on-premises/admin/configure-quick-find>

QUESTION 2

A customer uses Dynamics 365 for Customer Service.

Customer service representatives must be able to create knowledge base articles.

You need to ensure that all knowledge base articles are submitted for review and approval before they are made available to use.

Which four actions must be performed 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

- Select Associate category
- Assign the article
- Publish the article
- Create an alternate key
- Approve the article
- Create a knowledge article
- Select Create major version
- Mark the knowledge article for review

Answer Area



Correct Answer:

Actions

Select Associate category
Assign the article
Create an alternate key
Select Create major version

Answer Area

	Create a knowledge article	
⏪	Mark the knowledge article for review	⏩
⏩	Approve the article	⏪
	Publish the article	

References: <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/customer-service/customer-service-hub-user-guide-knowledge-article>

QUESTION 3

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

You want to make sure that a client only receives support for the products that they have procured.

To which of the following should you add the products?

What should you do?

- A. The business rule
- B. The case
- C. The client's entitlement
- D. The client's profile

Correct Answer: C

QUESTION 4

DRAG DROP

You are setting up Omnichannel for Customer Service.

You need to automate the following tasks to make it easier and quicker for representatives to assist customers:

Establish a one-step process to send a predefined email to customers once a representative is done helping them.

Ensure that representatives ask predefined questions to identify a customer before troubleshooting a case.

Have chatbots available to help make recommendations in typed conversations.

Which tools should you use? To answer, drag the appropriate tools to the correct requirements. Each tool 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:

Tools

Resources

Security roles

Working hours

Business closures

Answer Area

Requirement

Send predefined emails.

Ask predefined questions.

Include recommendation chatbots.

Tool

Correct Answer:

Tools

Answer Area

Requirement

Send predefined emails.

Ask predefined questions.

Include recommendation chatbots.

Tool

Resources

Security roles

Working hours

Box 1: Resources

Establish a one-step process to send a predefined email to customers once a representative is done helping them.

Box 2: Security roles

Ensure that representatives ask predefined questions to identify a customer before troubleshooting a case.

Assign a security role

Security roles control a user's access to data through a set of access levels and permissions. The combination of access levels and permissions that are included in a specific security role sets limits on the user's view of data and on the user's

interactions with that data.

Box 3: Working hours

Have chatbots available to help make recommendations in typed conversations.

Operating hours define the hours when your organization's customer support team is active and available to serve customers. By setting up operating hours, you help your customers and your organization work together to resolve issues.

The operating hour schedules cater to the following scenarios:

Display the non-availability of customer support on public holidays that are otherwise operating hours.

Accommodate change of calendar timings for daylight saving time twice an year for timezones that have implemented the daylight saving time. *-> Set up separate schedules for agents, bots, and queues to cater to different business

scenarios and product lines seamlessly for any channel. Define schedules to transition customer queues from bots to agents. Customize the display and other settings of the chat widget during non-business hours.

QUESTION 5

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

What should you configure?

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: A

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

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