MB-230^{Q&As}

Microsoft Dynamics 365 Customer Service

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QUESTION 1

You are customizing a Dynamics 36S Customer Service implementation for a company.

The company\'s support center wants to open a chat channel in a Power Apps portal for their partners.

You need to add a chat widget in the portal.

What should you do?

A. Copy the code snippet from the chat form and paste it in the web template of the portal home page.

B. Copy the code snippet from the workstream form and paste it in the Chat Widget Code in Content Snippets.

C. Copy the code snippet from the workstream form and paste it in the web template of the portal home page.

D. Copy the code snippet from the char form and paste it in the Chat Widget Code in Content Snippets

Correct Answer: D

QUESTION 2

A company administrator is setting up Dynamics 365 Omnichannel for Customer Service.

The administrator is unable to complete the setup due to insufficient permissions.

You need to ensure that the administrator can complete the setup.

Which three security settings should you assign to the administrator? Each correct answer presents part of the solution.

NOTE: Each correct selection is worth one point.

A. Dynamics 365 System Administrator

B. Power Platform Admin role

C. Read access to the Client Access License

D. Dynamics 365 Global Administrator

E. -write access to the Client Access License

Correct Answer: ABD

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

QUESTION 4

HOTSPOT

A company installs and services air filtration units for industrial manufacturing plants. The company is implementing Dynamics 365 Customer Service.

Each regional location supports a specific geographic region. Installers and service technicians are dispatched from these regional locations.

You need to configure the system to optimize work scheduling.

How should you configure the system? To answer, select the appropriate options in the answer area.
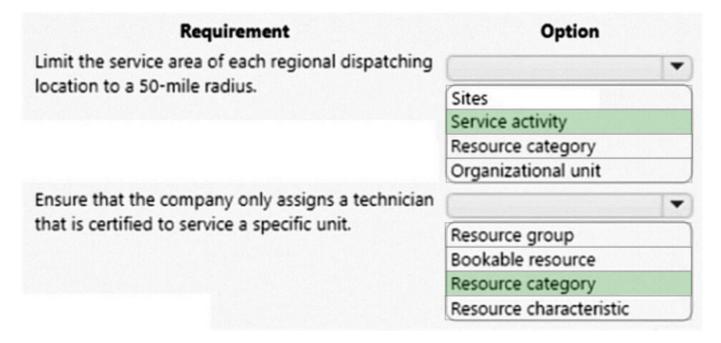
NOTE: Each correct selection is worth one point.

Hot Area:

Requirement	Option
Limit the service area of each regional dispatching location to a 50-mile radius.	▼
	Sites
	Service activity
	Resource category
	Organizational unit
Ensure that the company only assigns a technician that is certified to service a specific unit.	▼
	Resource group
	Bookable resource
	Resource category
	Resource characteristic

Correct Answer:

Requirement	Option
Limit the service area of each regional dispatching location to a 50-mile radius.	▼
	Sites
	Service activity
	Resource category
	Organizational unit
Ensure that the company only assigns a technician that is certified to service a specific unit.	▼
	Resource group
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Box 1: Service activity

Avoid disruptions in service by making sure that your resources are scheduled optimally and efficiently. Using Scheduling in Customer Service Hub, you can plan and schedule service activities for your customers by bringing together all your

resources.

Note: Create a service activity

A service activity is defined to look for the next available time slot to schedule the service and align resources as per requirement.

Box 2: Resource category

Create resource groups

The resources are aligned in resource groups or resource categories. For example, Bert Hair and Gilda Moss are grouped as Technicians and Bike repair workbench - 1 and Bike repair workbench - 2 are grouped as Workbenches.

With bookable resource categories, you can group your bookable resources by type. For example, you can create categories like technician, supervisor, subcontractor, vehicle, or equipment.

QUESTION 5

You need to search for answers to customer claims.

Which type of search should you perform?

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 studyTo 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

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

1.

Health maintenance organization (HMO)

2.

Preferred-provider organization (PPO)

3.

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

1.

Humongous Insurance has three departments to handle claim types: HMO, PPO, and Gold.

2.

The company uses handwritten forms to send claims information to the correct department.

3.

Each department maintains a workbook to record calls received.

Requirements. Support desk

1.

Configure the system to track the number of insurance claims filed each year.

2.

Categorize claims by type as they are opened.

3.

Configure the system to track staff responsiveness to service-level agreements (SLAs).

4.

Ensure that business hours reflect the hours that support staff are scheduled.

Requirements. Case handling

1.

All new cases must be automatically placed into a queue based on insurance type after the type is selected.

2.

All insurance types need to be automatically moved to the proper queue when the subject is picked.

3.

All cases must be created and closed immediately when received.

4.

The status reason must be set to Email Sent or Phone Call.

5.

Information must be restricted by insurance and phone call type.

6.

Managers must be alerted when customers reach their limit of 25 cases for the year.

7.

Changes to cases must not be counted against entitlements until the case is closed.

Requirements. Disputes

1.

Claim disputes must be categorized as low priority.

2.

The status for all disputed cases must be set to Review by a Manager before a disputed case may be closed.

Requirements. Knowledge base

1.

A knowledge base must be used as a repository for all answers.

2.

Representatives must be able to search the knowledge base when opening a new case for similar claims.

3.

Representatives must be able to search across all entities at all times.

4.

Searches must check any field in the entity for matches in a single search.

5.

Searches must return results in a single list and sort the list so that the most relevant results appear at the top of the list.

6.

Representatives must be able to link the knowledge base to cases when applicable.

7.

Representatives must create a new knowledge base article if an answer is not found in the existing knowledge base.

8.

Representatives must be able to use SQL-like syntax to search the knowledge base.

Requirements. Service-level agreements

When a customer calls to open a claim, the company must respond to the caller within the following time frames:

Plan Response time

HMO 24 hours PPO 6 business hours Gold 1 business hour

Requirements. Alerts

1.

Cases must be flagged when they are past the SLA threshold.

2.

An email alert must be sent to the manager to indicate an SLA noncompliance.

3.

An email alert must be sent to representatives for SLA violations as follows: HMO 2 hours prior and PPO 1 hour prior.

4.

Send an email alert to support managers when disputes are ready to be closed.

5.

Send an email alert to customers when cases are closed.

Requirements. Issues

1.

The current process is all manual and not efficient.

2.

There is no easy way to determine whether the company is meeting its SLAs.

3.

Representatives are often inconsistent regarding how they handle customers and answer customer questions.

4.

There is no accountability for any of the representatives who take calls.

A. Timeline

B. Quick Find

C. Related

D. Detail

E. Case Relationships

Correct Answer: C

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

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