



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

Microsoft Dynamics 365 Customer Service

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### QUESTION 1

A client plans to implement a case resolution process.

Which field types does the Case Resolution form use? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

## Answer Area

Field Text	Option type
Resolution type	<div style="border: 1px solid gray; padding: 2px;"><div style="background-color: #f0f0f0; padding: 2px; display: flex; justify-content: flex-end;"><span>▼</span></div><div style="padding: 2px;">Option set</div><div style="padding: 2px;">Text</div><div style="padding: 2px;">Calculated</div></div>
Resolution	<div style="border: 1px solid gray; padding: 2px;"><div style="background-color: #f0f0f0; padding: 2px; display: flex; justify-content: flex-end;"><span>▼</span></div><div style="padding: 2px;">Option set</div><div style="padding: 2px;">Text</div><div style="padding: 2px;">Calculated</div></div>
Total time	<div style="border: 1px solid gray; padding: 2px;"><div style="background-color: #f0f0f0; padding: 2px; display: flex; justify-content: flex-end;"><span>▼</span></div><div style="padding: 2px;">Option set</div><div style="padding: 2px;">Text</div><div style="padding: 2px;">Calculated</div></div>
Billable time	<div style="border: 1px solid gray; padding: 2px;"><div style="background-color: #f0f0f0; padding: 2px; display: flex; justify-content: flex-end;"><span>▼</span></div><div style="padding: 2px;">Option set</div><div style="padding: 2px;">Whole number</div><div style="padding: 2px;">Calculated</div></div>
Remarks	<div style="border: 1px solid gray; padding: 2px;"><div style="background-color: #f0f0f0; padding: 2px; display: flex; justify-content: flex-end;"><span>▼</span></div><div style="padding: 2px;">Option set</div><div style="padding: 2px;">Text</div><div style="padding: 2px;">Calculated</div></div>

Correct Answer:



## Answer Area

Field Text	Option type
Resolution type	<div style="border: 1px solid gray; padding: 2px;"><div style="background-color: #cccccc; padding: 2px; text-align: right;">▼</div><div style="background-color: #d9ead3; padding: 2px;">Option set</div><div style="padding: 2px;">Text</div><div style="padding: 2px;">Calculated</div></div>
Resolution	<div style="border: 1px solid gray; padding: 2px;"><div style="background-color: #cccccc; padding: 2px; text-align: right;">▼</div><div style="padding: 2px;">Option set</div><div style="background-color: #d9ead3; padding: 2px;">Text</div><div style="padding: 2px;">Calculated</div></div>
Total time	<div style="border: 1px solid gray; padding: 2px;"><div style="background-color: #cccccc; padding: 2px; text-align: right;">▼</div><div style="padding: 2px;">Option set</div><div style="padding: 2px;">Text</div><div style="background-color: #d9ead3; padding: 2px;">Calculated</div></div>
Billable time	<div style="border: 1px solid gray; padding: 2px;"><div style="background-color: #cccccc; padding: 2px; text-align: right;">▼</div><div style="background-color: #d9ead3; padding: 2px;">Option set</div><div style="padding: 2px;">Whole number</div><div style="padding: 2px;">Calculated</div></div>
Remarks	<div style="border: 1px solid gray; padding: 2px;"><div style="background-color: #cccccc; padding: 2px; text-align: right;">▼</div><div style="padding: 2px;">Option set</div><div style="background-color: #d9ead3; padding: 2px;">Text</div><div style="padding: 2px;">Calculated</div></div>

### QUESTION 2

You are a Dynamics 365 system administrator.

Your customer service team must define goal metrics to track and measure all resolved cases.

You need to create a goal metric with a rollup field.

In which order should you perform the actions? To answer, move all actions from the list of actions to the answer area and arrange them in the correct order.

Select and Place:



### Actions

- Create a new rollup field.
- Define the metric. Enter metric and amount data types.
- Specify details about the source data that rolls up.
- Specify the date field that determines the goal period that the records will roll up into.
- Specify the rollup field to track against goals.

### Answer Area



Correct Answer:

### Actions

Empty action selection area with five horizontal lines.

### Answer Area

Define the metric. Enter metric and amount data types.

Create a new rollup field.

Specify the rollup field to track against goals.

Specify details about the source data that rolls up.

Specify the date field that determines the goal period that the records will roll up into.

References: <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/sales-enterprise/create-edit-goal-metric>

### QUESTION 3

#### HOTSPOT

You need to choose the appropriate actions when using the knowledge base.

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

NOTE: Each correct selection is worth one point.

Hot Area:



**Status**

**Action**

The knowledge base answer was found

	▼
Link to resolved case	
Email the knowledge base article to the customer	
Create a knowledge base article	
Publish the article	

Resolve the case

	▼
Link to resolved case	
Email the knowledge base article to the customer	
Create a knowledge base article	
Publish the article	

The answer is not in the knowledge base

	▼
Link to resolved case	
Email the knowledge base article to the customer	
Create a knowledge base article	
Publish the article	

Correct Answer:

**Status**

**Action**

The knowledge base answer was found

	▼
Link to resolved case	
Email the knowledge base article to the customer	
Create a knowledge base article	
Publish the article	

Resolve the case

	▼
Link to resolved case	
Email the knowledge base article to the customer	
Create a knowledge base article	
Publish the article	

The answer is not in the knowledge base

	▼
Link to resolved case	
Email the knowledge base article to the customer	
Create a knowledge base article	
Publish the article	

Box 1: Email the knowledge base article to the customer Support representatives must use the knowledge base first to try to solve issues. The knowledge base article that is used to resolve a case must always be sent to the customer.

Box 2: Link to resolved case

Support representatives must be able to reference the knowledge base when it is used to resolve the case.

Box 3: Create a knowledge base article



If the answer is not in the knowledge base, a support representative needs to create a knowledge base article.

#### QUESTION 4

##### HOTSPOT

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.

Hot Area:

#### Answer Area

Scenario	Configuration
Escalation workstreams	<div style="border: 1px solid black; padding: 5px;"><div style="border: 1px solid black; background-color: #f0f0f0; padding: 2px; margin-bottom: 2px;">▼</div><div style="border: 1px solid black; padding: 2px; margin-bottom: 2px;">One routing rule that includes both escalations and regular tickets</div><div style="border: 1px solid black; padding: 2px; margin-bottom: 2px;">Two routing rules: one for escalations and one for regular tickets</div><div style="border: 1px solid black; padding: 2px; margin-bottom: 2px;">Code snippet to engage a bot</div><div style="border: 1px solid black; padding: 2px;">Bot channel from the Microsoft Azure portal</div></div>
Escalation handling tool	<div style="border: 1px solid black; padding: 5px;"><div style="border: 1px solid black; background-color: #f0f0f0; padding: 2px; margin-bottom: 2px;">▼</div><div style="border: 1px solid black; padding: 2px; margin-bottom: 2px;">Power Virtual Agents</div><div style="border: 1px solid black; padding: 2px; margin-bottom: 2px;">Unified Service Desk</div><div style="border: 1px solid black; padding: 2px; margin-bottom: 2px;">Customer Service Insights</div><div style="border: 1px solid black; padding: 2px;">Customer Insights</div></div>

Correct Answer:



## Answer Area

Scenario	Configuration
Escalation workstreams	<ul style="list-style-type: none"><li>One routing rule that includes both escalations and regular tickets</li><li>Two routing rules: one for escalations and one for regular tickets</li><li>Code snippet to engage a bot</li><li><b>Bot channel from the Microsoft Azure portal</b></li></ul>
Escalation handling tool	<ul style="list-style-type: none"><li><b>Power Virtual Agents</b></li><li>Unified Service Desk</li><li>Customer Service Insights</li><li>Customer Insights</li></ul>

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

### QUESTION 5

#### HOTSPOT

A customer service manager needs a new business process flow to manage support for a product rollout for bicycles. There are two bicycle models: standard and high performance.

Support representatives must be able to:

Specify the model of the bicycle.

Capture comments from customer support issues if the bicycle is the high-performance model.

You need to create the business process flow.

What should you configure for each requirement? To answer, select the appropriate options in the answer area.

Hot Area:



**Requirement**

Specify the model of the bicycle.

Capture comments from customer support issues if the bicycle is the high-performance model.

**Component**

Categories only
Categories and Subjects
Subjects only
Categories only
Categories and Subjects
Subjects only

Correct Answer:

**Requirement**

Specify the model of the bicycle.

Capture comments from customer support issues if the bicycle is the high-performance model.

**Component**

Categories only
Categories and Subjects
Subjects only
Categories only
Categories and Subjects
Subjects only

Box 1: Categories only Box 2: Categories and Subjects Note:

\*

Using the Categories entity, you can create hierarchical categorical data to help group records. Categorizing entity records in Dynamics 365 Customer Service helps you tag the records so that you can easily search them. Use the entity to

create and manage a logical structure of categories in Dynamics 365 Customer Service, and then associate entity records to one or more categories.

Categories are useful for reporting, sorting, segmenting, and categorization of records.

\*

The customer engagement apps (Dynamics 365 Sales, Dynamics 365 Customer Service, Dynamics 365 Field Service, Dynamics 365 Marketing, and Dynamics 365 Project Service Automation), include a subject organizational structure that

lets you mark and categorize service cases, knowledge base articles, products, and sales literature. By using the subject hierarchy, you can classify service cases to quickly provide service to your customer. You can also provide the





appropriate sales literature. You'll also be able to better understand gaps in your sales literature, evaluate service quality by subject area, and improve reporting on the performance of your products.

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