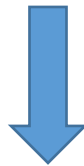


## Microsoft Dynamics 365 Certification MB-230 Exam



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

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NEW QUESTION 1

You are configuring a single business process flow in Dynamics 365 for Customer Service. You need to design the business process flow. What should you do?

- A. Merge peer branches to a single stage when merging branches.
- B. Span the process across 10 unique entities.
- C. Combine multiple conditions in a rule by using both the AND and OR operators.
- D. Use 40 steps per stage.

Answer: A

Explanation:

<https://docs.microsoft.com/en-us/dynamics365/customer-engagement/customize/enhance-business-process-flows-branching>

NEW QUESTION 2

A company has the following business units:

- Call center
- Customer service
- Digital response
- Escalation

The security roles have not been modified. The customer service business unit is the parent of all other business units. Each business unit has its own queues. Customer service cases are routed to the appropriate individuals by using the queues. You need to ensure that a specific user within the customer service business unit can read all queues within the parent and child business units. Which security role should you assign to the user?

- A. Customer service manager
- B. Scheduler
- C. Customer service representative
- D. System customizer

Answer: A

NEW QUESTION 3

You are a customer service representative using Dynamics 365 for Customer Service. You need to identify and eliminate duplicate cases. What should you do?

- A. Configure Dynamics 365 AI for Customer Service
- B. Use business rules
- C. Merge cases
- D. Use parent-child case relationships

Answer: B

NEW QUESTION 4

You manage Dynamics 365 for Customer Service. You need to configure automatic case creation for emails received by customers who have a support contract. What should you do?

- A. Configure service level agreements to be on hold until a call can be made to the customer.
- B. Create an automatic record creation and update rule.  
Set the source type to email.  
Configure the rule to send automatic email responses to customers when records are created.
- C. Create an automatic record creation and update rule.  
Set the source type to service activity.  
Configure the rule to send automatic email responses to customers when records are created.

- D. Create an automatic record creation and update rule.  
Set the source type to email.  
If a valid entitlement exists, configure the rule to create a case.

Answer: D

NEW QUESTION 5

A customer service organization plans to implement knowledge management for a custom entity named Root Cause Analysis. Users must be able to search, link, and rate knowledge articles. Users must be provided with suggested knowledge articles. You need to configure Dynamics 365 for Customer Service. Which three actions should you perform? (Each correct answer presents part of the solution. Choose three.)

- A. Navigate to the Knowledge Base Management Settings wizard. Then, navigate to Record types and select Root Cause Analysis.
- B. Add a lookup to the article entity.
- C. In Solution Explorer, expand the Root Cause Analysis entity and select Forms. Edit the main form and configure a knowledge base search control.
- D. In Solution Explorer, expand the Root Cause Analysis entity and select Forms. Edit the main form and configure a subgrid for knowledge articles.
- E. In Solution Explorer, select the Root Cause Analysis entity and then select Knowledge management.

Answer: ACE

NEW QUESTION 6

A company uses Dynamics 365 for Customer Service. A case in the queue is routed to you. You will be going on a vacation. You need to assign the case to someone else. What should you do?

- A. Release the case.
- B. Route the case to another queue.
- C. Share the case.
- D. Escalate the case.

Answer: A

NEW QUESTION 7

Customer service representatives are not able to manually add service-level agreements (SLAs) to a record. You need to enable on-demand SLAs. What should you do?

- A. Configure the scope of the workflow.
- B. Publish the on-demand SLA.
- C. Activate the SLA.
- D. Request an administrator to add the SLA field to the entity form.

Answer: D

NEW QUESTION 8

You are a customer service manager using Dynamics 365 for Customer Service. You need to restrict support to the products that a customer has purchased. What should you do?

- A. Add the product to the account.
- B. Add the products to the case.
- C. Add the products to the customer's entitlement.
- D. Add the products to the customer.

Answer: C

**NEW QUESTION 9**

HotSpot

You use Dynamics 365 for Customer Service administrator. You plan to create Voice of the Customer surveys. You need to determine which survey question feature is needed to complete the design of the survey. Which survey features should you use? (To answer, select the appropriate survey type in the dialog box in the answer area.)

**Answer Area**

Scenario	Survey type
Create a theme for the survey with the company logo and colors.	<div style="border: 1px solid gray; padding: 2px;"> <div style="background-color: #cccccc; padding: 2px; text-align: right;">▼</div> <div style="padding: 2px;">Basic survey</div> <div style="padding: 2px;">Response routing</div> <div style="padding: 2px;">Piping</div> <div style="padding: 2px;">Tagging</div> </div>
Create a different set of follow-up questions depending on the answer the candidate selects.	<div style="border: 1px solid gray; padding: 2px;"> <div style="background-color: #cccccc; padding: 2px; text-align: right;">▼</div> <div style="padding: 2px;">Basic survey</div> <div style="padding: 2px;">Client-side routing</div> <div style="padding: 2px;">Response routing</div> <div style="padding: 2px;">Piping</div> </div>
Hide questions depending on the answer the candidate selects.	<div style="border: 1px solid gray; padding: 2px;"> <div style="background-color: #cccccc; padding: 2px; text-align: right;">▼</div> <div style="padding: 2px;">Basic survey</div> <div style="padding: 2px;">Response routing</div> <div style="padding: 2px;">Client-side routing</div> <div style="padding: 2px;">Tagging</div> </div>
Populate the second question with answers from the first question.	<div style="border: 1px solid gray; padding: 2px;"> <div style="background-color: #cccccc; padding: 2px; text-align: right;">▼</div> <div style="padding: 2px;">Piping</div> <div style="padding: 2px;">Response routing</div> <div style="padding: 2px;">Client-side routing</div> <div style="padding: 2px;">Tagging</div> </div>

Answer:

## Answer Area

### Scenario

Create a theme for the survey with the company logo and colors.

Create a different set of follow-up questions depending on the answer the candidate selects.

Hide questions depending on the answer the candidate selects.

Populate the second question with answers from the first question.

### Survey type

	▼
Basic survey	
Response routing	
Piping	
Tagging	
	▼
Basic survey	
Client-side routing	
Response routing	
Piping	
	▼
Basic survey	
Response routing	
Client-side routing	
Tagging	
	▼
Piping	
Response routing	
Client-side routing	
Tagging	

Explanation:

<https://docs.microsoft.com/en-us/dynamics365/customer-engagement/voice-of-customer/design-advanced-survey>

### NEW QUESTION 10

Drag and Drop

You are a Dynamics 365 for Customer Service administrator. You must track time against enhanced service-level agreements (SLAs). You need to add a timer. Which three actions should you perform in sequence? (To answer, move the appropriate actions from the list of actions to the answer area and arrange them in the correct order.)

**Actions**

- Add the quick create forms to the primary entity form.
- Create a quick view form for each SLA KPI instance field.
- Ensure the entity is enabled for SLA.
- Add the quick view forms to the primary entity form.
- Create a quick-create form for each SLA KPI instance field.

**Answer Area**

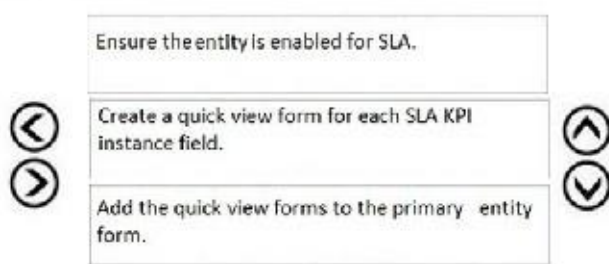


Answer:

**Actions**

- Add the quick create forms to the primary entity form.
- Create a quick view form for each SLA KPI instance field.
- Ensure the entity is enabled for SLA.
- Add the quick view forms to the primary entity form.
- Create a quick-create form for each SLA KPI instance field.

**Answer Area**



Explanation:

<https://docs.microsoft.com/en-us/dynamics365/customer-engagement/customer-service/add-timer-forms-track-time-against-enhanced-sla>

**NEW QUESTION 11**

Your company provides clients with Dynamics 365 for Customer Service Voice of the Customer employee satisfaction surveys. The company has a standardized set of survey questions named Satisfaction Survey. You need to customize the survey for each client.

Solution: Clone the satisfaction survey and customize the questions.

Does the solution meet the goal?

- A. Yes
- B. No

Answer: A

**NEW QUESTION 12**

Your company provides clients with Dynamics 365 for Customer Service Voice of the Customer employee satisfaction surveys. The company has a standardized set of survey questions named Satisfaction Survey. You need to customize the survey for each client.

Solution: Create custom question types. Add the custom question types to a new survey. Customize the questions.

Does the solution meet the goal?

- A. Yes
- B. No

Answer: B

#### NEW QUESTION 13

You send surveys to customers who have opened cases within the past month. You need to send a summary of the survey results to individuals who do not have a Dynamics 365 license. What are two possible ways to achieve the goal? (Each correct answer presents a complete solution. Choose two.)

- A. Run the summary report.  
Export the report to Microsoft Excel. Send the Excel file to the users.
- B. Run the survey summary report.  
Send a link to the report from within Dynamics 365.
- C. Create a dashboard of the survey summary reports and share the dashboards with the users.
- D. Create a view with the data, and then email a link.
- E. Run the survey summary report.  
Print the report to a PDF file.  
Send the PDF file to the users.

Answer: AE

#### NEW QUESTION 14

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#### NEW QUESTION 97

You are deploying a Unified Service Desk (USD) application. For which three scenarios can you attach an action call? (Each correct answer presents a complete solution. Choose three.)

- A. A window navigation rule is processed.
- B. Client diagnostic logging is turned on.
- C. A threshold is reached in a Microsoft Power BI report.
- D. An agent script is run or an answer is clicked.
- E. A toolbar button is clicked.

Answer: ADE

#### NEW QUESTION 98

Which three actions can you perform by using editable grids? (Each correct answer presents a complete solution. Choose three.)

- A. Update a lookup field to a custom entity.
- B. Edit records by using mobile clients.
- C. Group records by a specific column.
- D. Update a Customer Type lookup field.
- E. Update the value of an Owner lookup field.

Answer: ACD



NEW QUESTION 99

You install Microsoft Dynamics 365. Which three knowledge base article templates are available? (Each correct answer presents a complete solution. Choose three.)

- A. Solution to a Problem
- B. Standard KB Article
- C. Case Escalation
- D. Coverage Dates
- E. Procedure

Answer: BDE

NEW QUESTION 100

Which of the following capabilities is only available when using enhanced SLAs?

- A. pause an SLA
- B. use security roles to control SLA creation
- C. track Key Performance Indicators (KPIs)
- D. define failure actions

Answer: C

NEW QUESTION 101

You create an entitlement that decreases the total terms when cases are created. You need to identify what will cause the value of the remaining terms of an entitlement to be incremented or decremented. What are two possible causes that you can identify? (Each correct answer presents a complete solution. Choose two.)

- A. when a case that is attached to the entitlement is resolved
- B. when the entitlement is attached to a new contact
- C. when a case that is attached to the entitlement is deleted
- D. when the entitlement is attached to a new case

Answer: CD

NEW QUESTION 102

You create a new case that is associated to a service level agreement (SLA). You need to identify what occurs when the case is placed on hold. What should you identify?

- A. An automatic notification is sent to the manager of the user who placed the case on hold.
- B. An automatic notification is sent to the customer who initiated the case.
- C. The time calculations for the Key Performance Indicators (KPIs) are paused.
- D. Users are prevented from editing the case record until the On Hold status changes.

Answer: C

NEW QUESTION 103

You have two sites. You need to ensure that all of the resources for a scheduling activity are from the same site. What should you use?

- A. a selection rule
- B. a resource group
- C. a service level agreement (SLA)
- D. a field security profile



Answer: A

NEW QUESTION 104

Which two of the following are valid routing rule actions? (Each correct answer presents part of the solution. Choose two.)

- A. Cancel Case
- B. Send Email
- C. Assign to User/Team
- D. Route to Queue

Answer: BC

NEW QUESTION 105

You have a Microsoft Dynamics 365 environment. You implement Field Service. You need to set up a service task type. Which three fields, components, or relationships are available when you create a new service task type? (Each correct answer presents a complete solution. Choose three.)

- A. Description
- B. Notes
- C. Field Agent
- D. Estimated Duration
- E. Work Order Duration

Answer: ABD

NEW QUESTION 106

You need to change the warehouse location for product inventory. What should you do?

- A. Create a new Product Relationship record.
- B. Create a new Warehouse record.
- C. Create a new Inventory Transfer record.
- D. Create a new Inventory Adjustment record.

Answer: D

NEW QUESTION 107

You have a Microsoft Dynamics 365 environment. You implement Field Service. A user named User1 is creating an agreement. User1 attempts to set the agreement booking dates and agreement invoice dates but reports that the options are disabled. You need to resolve the issue. What should you do?

- A. In System Settings, set the Fiscal Year End.
- B. Set the work order duration.
- C. Add the Customer Service Representative role to User1.
- D. Set the agreement status to Active.

Answer: A

NEW QUESTION 108

What are two examples of entitlement allotment options? (Each correct answer presents a complete solution. Choose two.)

- A. Number of Channels
- B. Number of Products

- C. Number of Cases
- D. Number of Hours

Answer: CD

NEW QUESTION 109

Your organization uses enhanced service level agreements (SLA's). You need to create a view that displays the SLA failure and succeeded time for data related to a case. Which entity should you use to select the fields?

- A. SLA
- B. Enhanced SLAs
- C. SLA KPI Instance
- D. SLA Item

Answer: C

NEW QUESTION 110

Your organization plans to use Voice of the Customer to send surveys to select groups of customers. You need to customize branding colors and logos for the surveys. What should you do?

- A. Modify Voice of the Customer survey themes.
- B. Configure system settings.
- C. Modify Microsoft Dynamics 365 themes.
- D. Update Voice of the Customer piped data.

Answer: D

NEW QUESTION 111

You implement the Unified Service Desk (USD). You plan to implement actions and replacement parameters. Which three symbols are valid replacement keys? (Each correct answer presents a complete solution. Choose three.)

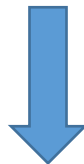
- A. ^
- B. -
- C. +
- D. \$
- E. ~

Answer: ACD

NEW QUESTION 112

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