https://www.leads4pass.com/mb-230.html

Vendor: Microsoft
Exam Code: MB-230
Exam Name: Microsoft Dynamics 365 Customer Service
Certification: Microsoft Certifications
Total Questions: 403 Q&A (View Details)
Updated on: Feb 25, 2026

Question 1:
You are a Dynamics 365 for Customer Service administrator creating surveys for Voice of the Customer.

You need to create a customer service satisfaction survey and embed it on a website.

Which two actions should you perform? Each correct answer presents part of the solution. NOTE: Each correct selection is worth one point.

A. Copy the portal web link and paste it into your website.

B. Copy the URL from the Anonymous link field and paste it into your website.

C. On the Voice of the Customer survey, select Run in iFrame.

D. Copy the HTML code from the iFrame URL field and paste it on your website.

Correct Answer: CD

References:

https://docs.microsoft.com/en-us/dynamics365/customer-engagement/voice-of-customer/distribute-survey

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Question 2:
You are implementing Dynamics 365 Customer Service Insights.

The product manager would like to see product sales trends by age group. The groupings are as follows:

1.

Ages 18 and younger

2.

Ages 19-25

3.

Ages 26-40

4.

Ages 41-55

5.

Ages 56 and older

You need to configure the system.

What should you define?

A. activity

B. measure

C. segment

D. member

Correct Answer: B

Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-insights/audience-insights/measures

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Question 3:
HOTSPOT

A company has satellite offices that service local areas.

Each office must have full control over its own resources.

You need to configure the organizational units to reflect the satellite office structure.

Which entities should you use to relate to the organizational units? To answer, select the appropriate options in the answer area.

Hot Area:

Person

Contact
Team Member
User
Bookable Resource

Activity

Service Activity
Work Order
Bookable Resource Booking
Case

Correct Answer:

Person

Contact
Team Member
User
Bookable Resource

Activity

Service Activity
Work Order
Bookable Resource Booking
Case

Question 4:

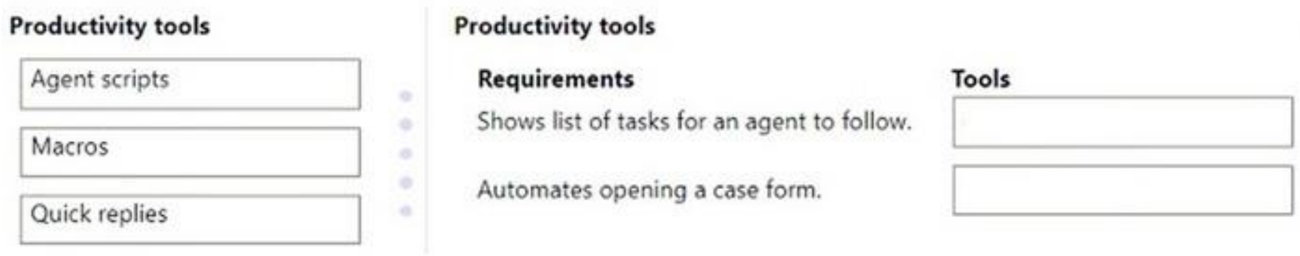
DRAG DROP

You need to identify the productivity tools to use for the agents.

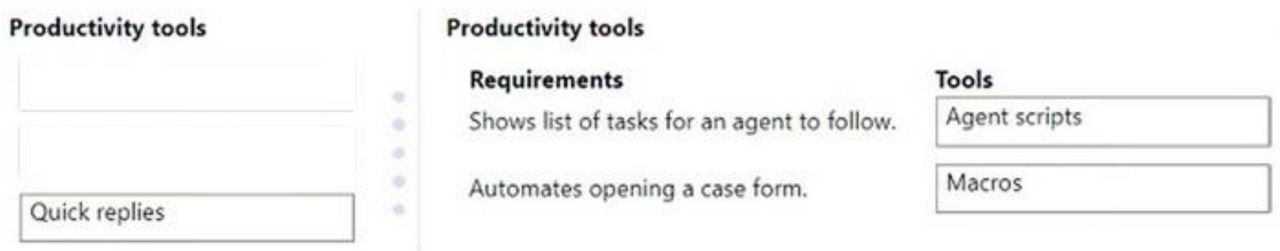
Which tools should you use? To answer, move the appropriate tools to the correct requirements. You may use each tool once, more than once, or not at all. You may need to move the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

Select and Place:



Correct Answer:



Question 5:

DRAG DROP

A company uses Dynamics 365 Customer Service. The company connects chatbots to its Omnichannel configuration.

The chatbot does not escalate calls to agents.

You need to troubleshoot the chatbot issue.

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.

NOTE: More than one order of answer choices is correct. You will receive credit for any of the correct orders you select.

Select and Place:

Create the chatbot application and assign it as an agent.

Add the chatbot to a voice workstream.

Add the chatbot to the queues.

Set escalation rules.

Set code to engage the chatbot.

Answer area

1

2

3

4

5

Correct Answer:

Answer area

1	Create the chatbot application and assign it as an agent.
2	Add the chatbot to a voice workstream.
3	Add the chatbot to the queues.
4	Set escalation rules.
5	Set code to engage the chatbot.

Question 6:

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.

NOTE: Each correct selection is worth one point.

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.

Correct Answer: ACE

Question 7:
You need to create the SLAs.

Which three SLAs should you create? Each correct answer presents part of the solution.

NOTE: Each correct selection is worth one point.

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. SLA with 24 hours as the failure time and no warning

B. SLA with 6 hours as the failure time and a one-hour warning

C. SLA with 6 hours as the failure time and no warning

D. SLA with one hour as the failure time and no warning

E. SLA with 24 hours as the failure time and a two-hour warning

Correct Answer: BDE

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

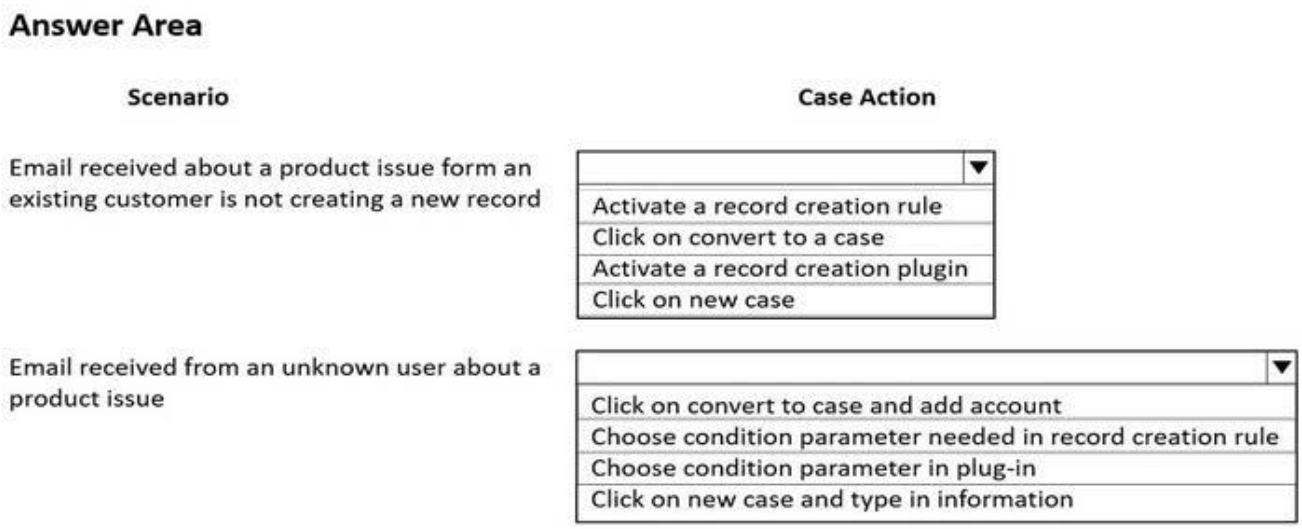
Question 8:
HOTSPOT

You need to meet the automatic case creation requirements.

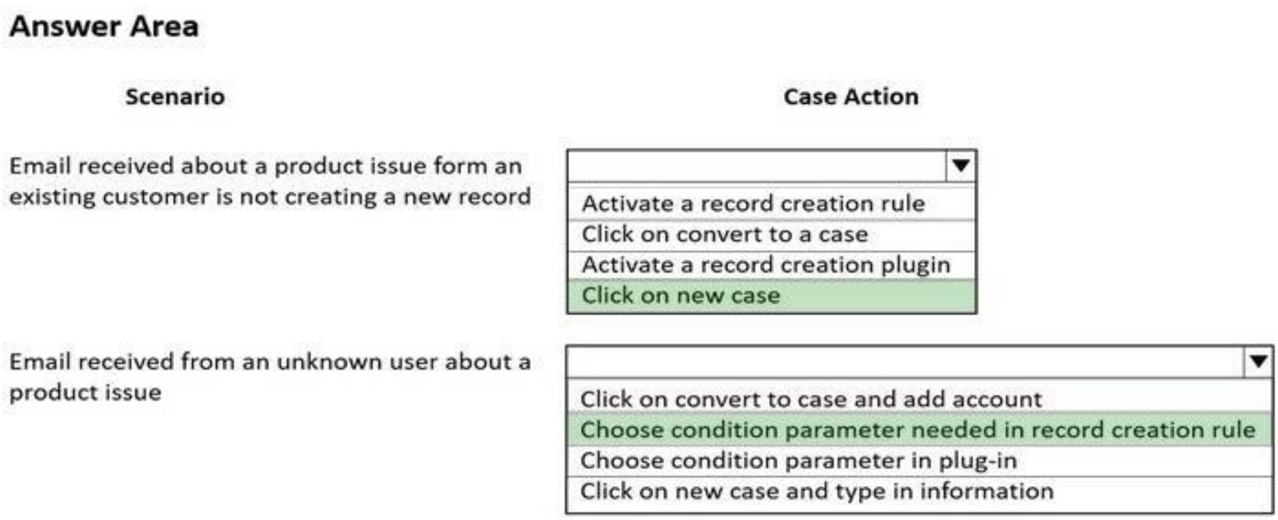
What should you do? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:



Correct Answer:



Reference:

https://docs.microsoft.com/en-us/dynamics365/customer-service/automatically-create-case-from-email

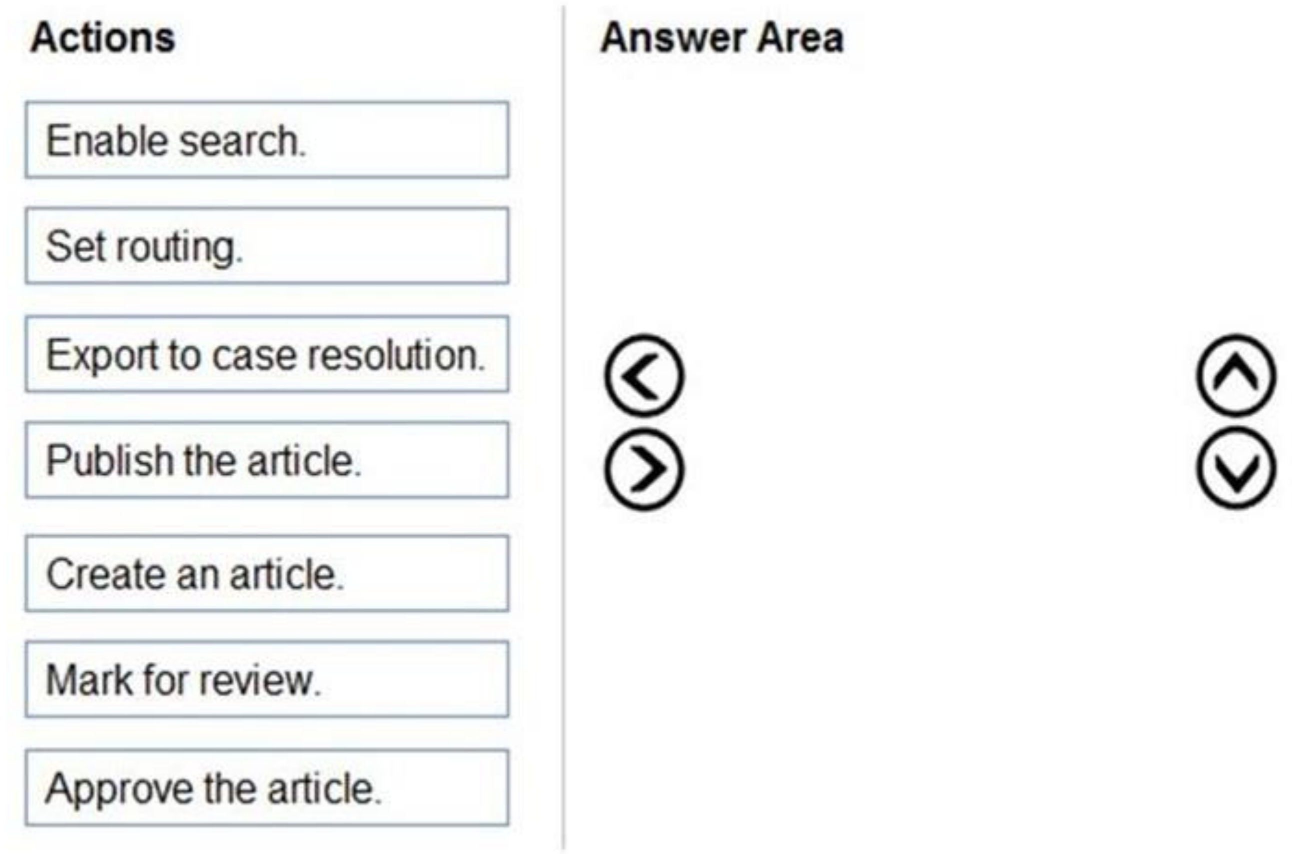
https://cloudblogs.microsoft.com/dynamics365/it/2017/07/25/convert-email-to-a-case-with-a-few-clicks-in-dynamics-365-app-for-outlook/

Question 9:
DRAG DROP

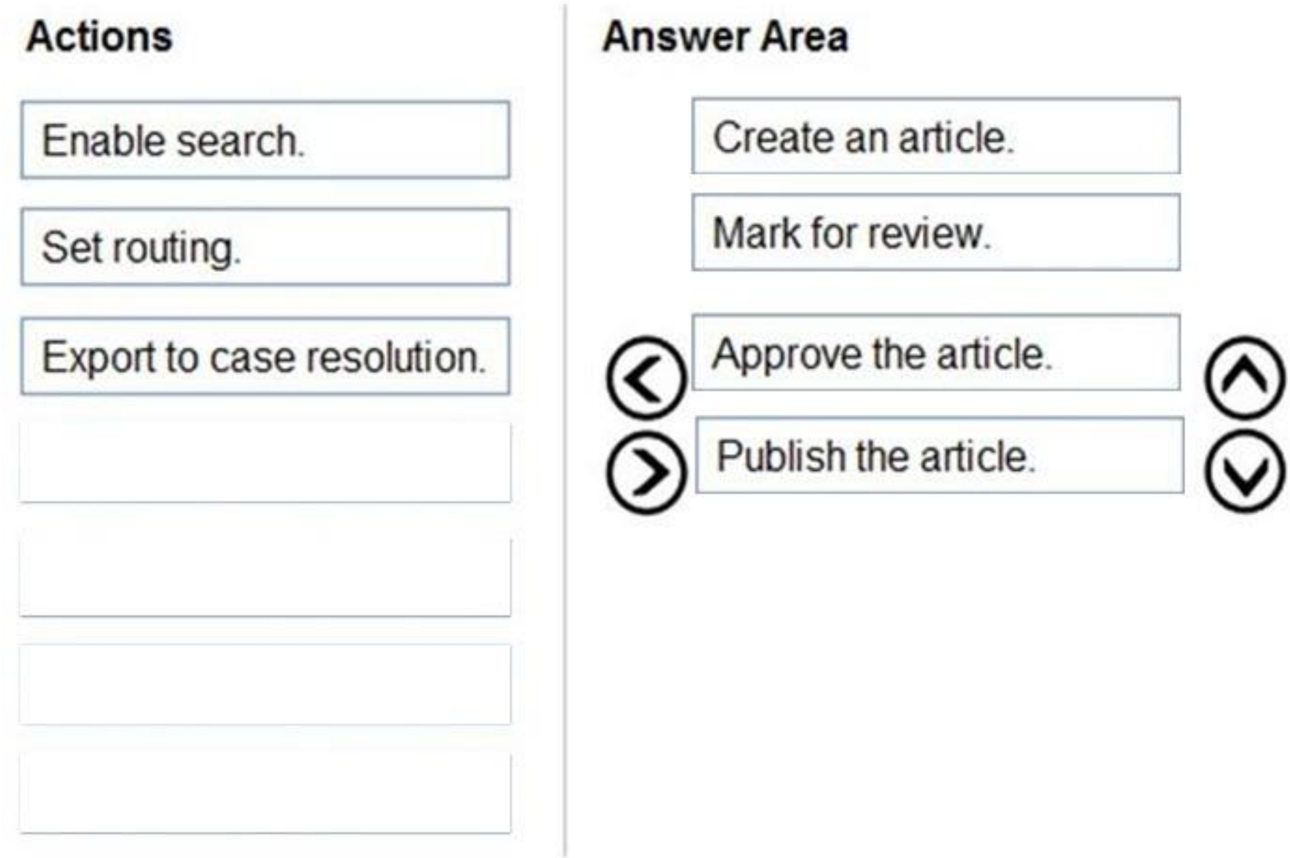
You need to configure the system to store answers about claims.

Which four actions should you perform in sequence? To answer, move all actions from the list to the answer area and arrange them in the correct order.

Select and Place:



Correct Answer:



Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-service/customer-service-hub-user-guide-knowledge-article

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Question 10:
Customer service agents do not have access to Customer Service historical analytics reports in Dynamics 365 Customer Service.

You need to provide access to the reports.

What are two possible ways to achieve this goal? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

A. Edit the Customer Service Representative security role to provide read-only access to analytics reports.

B. Create a new model-driven app to expose the reports and provide app access to the Customer Service Representative security role.

C. Create a new security role and provide read-only access to analytics reports.

D. Edit the Customer Service Representative Manager security role to provide read-only access to analytics reports.

Correct Answer: AB

Question 11:
A company enables custom context variables on a chat widget.

Users report that the context variables are not being populated on new chats.

You need to troubleshoot the issue by querying the event listeners.

Which listener is required to be running?

A. setContextProvider

B. startProactiveChat

C. startChat

D. getContextProvider

E. initializeNewConversation

Correct Answer: D

Question 12:
You are helping a company implement Power Virtual Agents with Omnichannel for Customer Service.

The company has a chatbot that escalates to a manager if a customer wants to escalate from a chatbot.

You need to configure a prerequisite before you can implement the chatbot.

Which prerequisite should you configure?

A. Configure context variables for a chatbot.

B. Create one chatbot in one queue with a human having a higher capacity over the chatbot.

C. Create one chatbot in one queue with the chatbot having the highest capacity over human capacity.

D. Configure a Microsoft Teams support channel for the chatbot.

E. Configure an SMS channel for a chatbot.

Correct Answer: A

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

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Question 13:
You have been tasked with forwarding surveys to clients that opened cases in the last 30 days.

You want to make sure that clients without a Dynamics 365 license still receives a summary of the survey results.

Which two of the following are file formats that the summary can be sent in?

A. .xlsx

B. .exe

C. .pdf

D. .txt

Correct Answer: AC

Question 14:
You are responsible for designing surveys via Voice of the Customer (VoC).

You want to make sure that the design allows for questions to be shown or hidden according to answer selected.

You include Client-side routing in the design.

Does the action achieve your objective?

A. Yes, it does

B. No, it does not

Correct Answer: A

Reference:
https://www.inogic.com/blog/2016/10/display-survey-questions-conditionally-for-voice-of-customer-in-dynamics-crm-2016/

Question 15:
HOTSPOT

You are a Dynamics 365 for Customer Service administrator. You enable full-text, relevance, and category search.

You need to use the knowledge base search control to locate knowledge base articles that contain each of the following words anywhere in an article, regardless of which product an article refers to:

1.

Elevator

2.

Motor

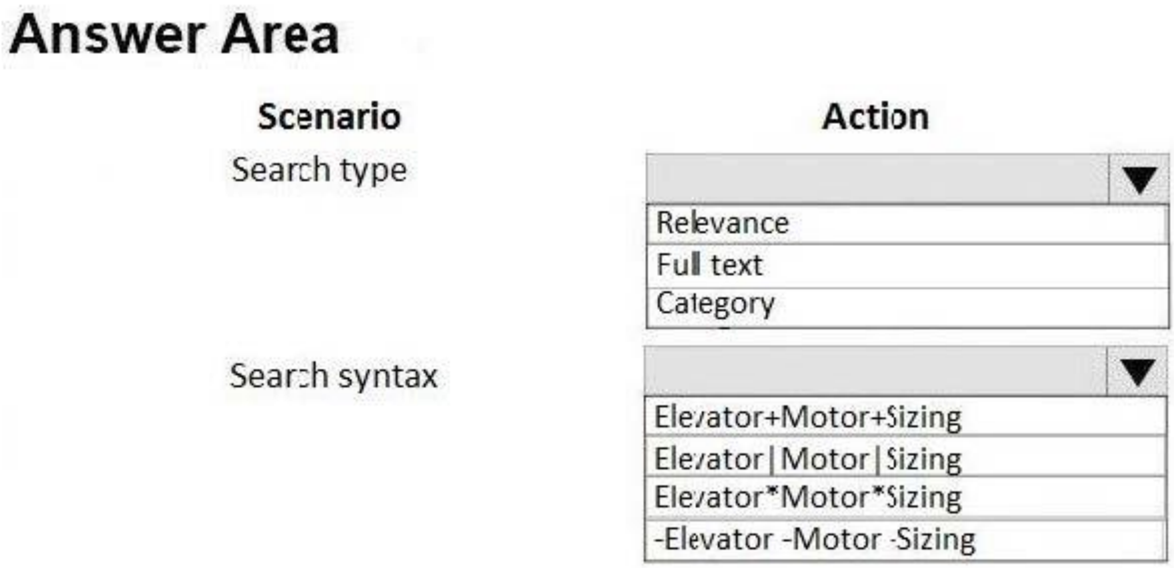
3.

Sizing

How should you configure the search? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:



Correct Answer:

Answer Area

Scenario	Action
Search type	Relevance Full text Category
Search syntax	Elevator+Motor+Sizing Elevator|Motor|Sizing Elevator*Motor*Sizing -Elevator -Motor -Sizing

References:
https://docs.microsoft.com/en-us/dynamics365/customer-engagement/basics/relevance-search-results