

# PDFVCE



Choose the version that fits your needs	PDF Version	Desktop Test Engine	Online Test Engine
Latest and Up-to-Date exam dumps with real exam questions answers.	✓	✓	✓
Get 12-Months free updates without any extra charges.	✓	✓	✓
Experience same exam environment before appearing in the certification exam.	✗	✓	✓
100% exam passing guarantee in the first attempt.	✓	✓	✓
20% discount on more than one license and 30% discount on 5+ license purchases.	✗	✓	✓
100% secure purchase on SSL.	✓	✓	✓
Completely private purchase without sharing your personal info with anyone.	✓	✓	✓

<http://www.pdfvce.com>

Highly Efficiently Exam Tool and Effective Exam Practice Materials

**Exam** : **MB-230**

**Title** : Microsoft Dynamics 365  
Customer Service Functional  
Consultant

**Vendor** : Microsoft

**Version** : DEMO

**NO.1** You need to ensure that customers cannot open more cases than they are allowed. Which four 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	Answer Area
Add the start date and end date.	
Save the entitlement and then add the entitlement channel.	
Add the entitlement channel as email with 25 as the total term.	
Add the entitlement channel as phone with 25 as the total term.	
Create new entitlement in Service Management.	
Add entitlement channel before saving the new entitlement.	
Create new service level agreement in Service Management.	

**Answer:**

Actions	Answer Area
Add the start date and end date.	
Save the entitlement and then add the entitlement channel.	
Add the entitlement channel as email with 25 as the total term.	
Add the entitlement channel as phone with 25 as the total term.	
Create new entitlement in Service Management.	
Add entitlement channel before saving the new entitlement.	
Create new service level agreement in Service Management.	

Actions	Answer Area
Add the start date and end date.	
Save the entitlement and then add the entitlement channel.	
Add the entitlement channel as email with 25 as the total term.	
Add the entitlement channel as phone with 25 as the total term.	
Create new entitlement in Service Management.	
Add entitlement channel before saving the new entitlement.	
Create new service level agreement in Service Management.	

Explanation:

Create new entitlement in Service Management.
Add the start date and end date.
Save the entitlement and then add the entitlement channel.
Add the entitlement channel as phone with 25 as the total term.

Reference:

<https://docs.microsoft.com/en-us/dynamics365/customer-service/create-entitlement-define-support-terms-customer>

Topic 1, Humongous Insurance

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

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

- \* Health maintenance organization (HMO)
- \* Preferred-provider organization (PPO)
- \* 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

- \* Humongous Insurance has three departments to handle claim types: HMO, PPO, and Gold.
- \* The company uses handwritten forms to send claims information to the correct department.
- \* Each department maintains a workbook to record calls received.

Requirements. Support desk

- \* Configure the system to track the number of insurance claims filed each year.
- \* Categorize claims by type as they are opened.
- \* Configure the system to track staff responsiveness to service-level agreements (SLAs).
- \* Ensure that business hours reflect the hours that support staff are scheduled.

Requirements. Case handling

- \* All new cases must be automatically placed into a queue based on insurance type after the type is selected.
- \* All insurance types need to be automatically moved to the proper queue when the subject is picked.

- \* All cases must be created and closed immediately when received.
- \* The status reason must be set to Email Sent or Phone Call.
- \* Information must be restricted by insurance and phone call type.
- \* Managers must be alerted when customers reach their limit of 25 cases for the year.
- \* Changes to cases must not be counted against entitlements until the case is closed.

#### Requirements. Disputes

- \* Claim disputes must be categorized as low priority.
- \* The status for all disputed cases must be set to Review by a Manager before a disputed case may be closed.

#### Requirements. Knowledge base

- \* A knowledge base must be used as a repository for all answers.
- \* Representatives must be able to search the knowledge base when opening a new case for similar claims.
- \* Representatives must be able to search across all entities at all times.
- \* Searches must check any field in the entity for matches in a single search.
- \* 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.
- \* Representatives must be able to link the knowledge base to cases when applicable.
- \* Representatives must create a new knowledge base article if an answer is not found in the existing knowledge base.
- \* 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:

<b>Plan</b>	<b>Response time</b>
HMO	24 hours
PPO	6 business hours
Gold	1 business hour

#### Requirements. Alerts

- \* Cases must be flagged when they are past the SLA threshold.
- \* An email alert must be sent to the manager to indicate an SLA noncompliance.
- \* An email alert must be sent to representatives for SLA violations as follows: HMO 2 hours prior and PPO 1 hour prior.
- \* Send an email alert to support managers when disputes are ready to be closed.
- \* Send an email alert to customers when cases are closed.

#### Requirements. Issues

- \* The current process is all manual and not efficient.
- \* There is no easy way to determine whether the company is meeting its SLAs.
- \* Representatives are often inconsistent regarding how they handle customers and answer customer questions.
- \* There is no accountability for any of the representatives who take calls.

**NO.2** You need to search for answers to customer claims.

Which type of search should you perform?

**A.** Timeline

- B. Quick Find
- C. Related
- D. Detail
- E. Case Relationships

**Answer:** B

Reference:

<https://docs.microsoft.com/en-us/dynamics365/customer-service/search-knowledge-articles-csh#knowledgebase-search-control>

**NO.3** You need to configure the correct settings.

Which settings should you configure? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Scenario	Setting
Process cases for an insurance type once a type is selected.	<div style="border: 1px solid gray; padding: 2px;"> <div style="text-align: right; border-bottom: 1px solid gray;">▼</div> <div style="padding: 2px;">Case routing</div> <div style="padding: 2px;">Automatically create and update records</div> <div style="padding: 2px;">Create queues</div> </div>
Receive and process an email from a customer to open an insurance claim.	<div style="border: 1px solid gray; padding: 2px;"> <div style="text-align: right; border-bottom: 1px solid gray;">▼</div> <div style="padding: 2px;">Case routing</div> <div style="padding: 2px;">Automatically create and update records</div> <div style="padding: 2px;">Create queues</div> </div>
Ensure cases phoned in can be separated and taken only by the applicable representative.	<div style="border: 1px solid gray; padding: 2px;"> <div style="text-align: right; border-bottom: 1px solid gray;">▼</div> <div style="padding: 2px;">Case routing</div> <div style="padding: 2px;">Automatically create and update records</div> <div style="padding: 2px;">Create queues</div> </div>

**Answer:**

Scenario	Setting
Process cases for an insurance type once a type is selected.	<div style="border: 1px solid gray; padding: 2px;"> <div style="text-align: right; border-bottom: 1px solid gray;">▼</div> <div style="padding: 2px;">Case routing</div> <div style="padding: 2px;">Automatically create and update records</div> <div style="padding: 2px;">Create queues</div> </div>
Receive and process an email from a customer to open an insurance claim.	<div style="border: 1px solid gray; padding: 2px;"> <div style="text-align: right; border-bottom: 1px solid gray;">▼</div> <div style="padding: 2px;">Case routing</div> <div style="padding: 2px;">Automatically create and update records</div> <div style="padding: 2px;">Create queues</div> </div>
Ensure cases phoned in can be separated and taken only by the applicable representative.	<div style="border: 1px solid gray; padding: 2px;"> <div style="text-align: right; border-bottom: 1px solid gray;">▼</div> <div style="padding: 2px;">Case routing</div> <div style="padding: 2px;">Automatically create and update records</div> <div style="padding: 2px;">Create queues</div> </div>

Explanation:

Scenario	Setting
Process cases for an insurance type once a type is selected.	<div style="border: 1px solid gray; padding: 2px;"> <div style="border-bottom: 1px solid gray; padding: 2px;">Case routing</div> <div style="border-bottom: 1px solid gray; padding: 2px;">Automatically create and update records</div> <div style="padding: 2px;">Create queues</div> </div>
Receive and process an email from a customer to open an insurance claim.	<div style="border: 1px solid gray; padding: 2px;"> <div style="border-bottom: 1px solid gray; padding: 2px;">Case routing</div> <div style="border-bottom: 1px solid gray; padding: 2px;">Automatically create and update records</div> <div style="padding: 2px;">Create queues</div> </div>
Ensure cases phoned in can be separated and taken only by the applicable representative.	<div style="border: 1px solid gray; padding: 2px;"> <div style="border-bottom: 1px solid gray; padding: 2px;">Case routing</div> <div style="border-bottom: 1px solid gray; padding: 2px;">Automatically create and update records</div> <div style="padding: 2px;">Create queues</div> </div>

**NO.4** You need to configure the settings to handle customer claims.

Which settings should you configure? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Answer Area

Scenario	Setting
Process cases for an insurance type once a type is selected.	<div style="border: 1px solid gray; padding: 2px;"> <div style="border-bottom: 1px solid gray; padding: 2px;">Create queues</div> <div style="border-bottom: 1px solid gray; padding: 2px;">Case routing</div> <div style="border-bottom: 1px solid gray; padding: 2px;">Automatically create and update records</div> <div style="padding: 2px;">Create queues</div> </div>
Receive and process an email from a customer to open an insurance claim.	<div style="border: 1px solid gray; padding: 2px;"> <div style="border-bottom: 1px solid gray; padding: 2px;">Automatically create and update records</div> <div style="border-bottom: 1px solid gray; padding: 2px;">Case routing</div> <div style="padding: 2px;">Automatically create and update records</div> </div>
Ensure cases phoned in can be separated and taken only by the applicable representative.	<div style="border: 1px solid gray; padding: 2px;"> <div style="border-bottom: 1px solid gray; padding: 2px;">Case routing</div> <div style="border-bottom: 1px solid gray; padding: 2px;">Case routing</div> <div style="padding: 2px;">Automatically create and update records</div> </div>

**Answer:**

Answer Area

Scenario	Setting
Process cases for an insurance type once a type is selected.	<div style="border: 1px solid black; padding: 2px;">                     Create queues ▼                      Case routing                      Automatically create and update records  <span style="background-color: #0070C0; color: white; padding: 2px;">Create queues</span> </div>
Receive and process an email from a customer to open an insurance claim.	<div style="border: 1px solid black; padding: 2px;">                     Automatically create and update records ▼                      Case routing  <span style="background-color: #0070C0; color: white; padding: 2px;">Automatically create and update records</span>                      Create queues                 </div>
Ensure cases phoned in can be separated and taken only by the applicable representative.	<div style="border: 1px solid black; padding: 2px;">                     Case routing ▼  <span style="background-color: #0070C0; color: white; padding: 2px;">Case routing</span>                      Automatically create and update records                      Create queues                 </div>

Explanation:

Answer Area

Scenario	Setting
Process cases for an insurance type once a type is selected.	<div style="border: 1px solid black; padding: 2px;">                     Create queues ▼                 </div>
Receive and process an email from a customer to open an insurance claim.	<div style="border: 1px solid black; padding: 2px;">                     Automatically create and update records ▼                 </div>
Ensure cases phoned in can be separated and taken only by the applicable representative.	<div style="border: 1px solid black; padding: 2px;">                     Case routing ▼                 </div>

**NO.5** A customer has three cases in process and two cases for the current calendar year. You need to determine how many cases the customer has left on their entitlement. How many cases are left?

- A. 20
- B. 22
- C. 23
- D. 25

**Answer:** C




Reference:

<https://docs.microsoft.com/en-us/dynamics365/customer-service/create-entitlement-define-support-termscustomer>

**NO.6** You need to create and configure objects to support the requirements. How should you configure the system? To answer, select the appropriate options in the answer area. NOTE: Each correct selection is worth one point.

Setting	Value
Total number of queues	<div style="border: 1px solid black; padding: 2px;"> <span style="float: right;">▼</span>  3                      4                      5                      6                 </div>
Number of automatic case creation rules	<div style="border: 1px solid black; padding: 2px;"> <span style="float: right;">▼</span>  1                      2                      3                      4                 </div>
Number of routing rule sets	<div style="border: 1px solid black; padding: 2px;"> <span style="float: right;">▼</span>  3                      4                      5                      6                 </div>

**Answer:**

Setting	Value
Total number of queues	
Number of automatic case creation rules	
Number of routing rule sets	

Explanation:

Setting	Value				
Total number of queues	<div style="border: 1px solid black; padding: 2px;"> <input type="text" value="3"/> ▼                 </div> <table border="1" style="width: 100%; text-align: center;"> <tr><td>3</td></tr> <tr><td>4</td></tr> <tr><td>5</td></tr> <tr><td>6</td></tr> </table>	3	4	5	6
3					
4					
5					
6					
Number of automatic case creation rules	<div style="border: 1px solid black; padding: 2px;"> <input type="text" value="1"/> ▼                 </div> <table border="1" style="width: 100%; text-align: center;"> <tr><td>1</td></tr> <tr><td>2</td></tr> <tr><td>3</td></tr> <tr><td>4</td></tr> </table>	1	2	3	4
1					
2					
3					
4					
Number of routing rule sets	<div style="border: 1px solid black; padding: 2px;"> <input type="text" value="3"/> ▼                 </div> <table border="1" style="width: 100%; text-align: center;"> <tr><td>3</td></tr> <tr><td>4</td></tr> <tr><td>5</td></tr> <tr><td>6</td></tr> </table>	3	4	5	6
3					
4					
5					
6					

**NO.7** 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.

### Actions

- Enable search.
- Set routing.
- Export to case resolution.
- Publish the article.
- Create an article.
- Mark for review.
- Approve the article.

### Answer Area

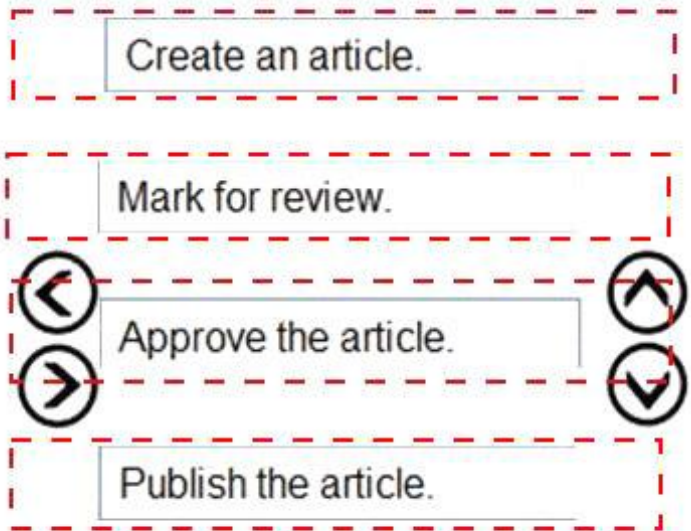


**Answer:**

### Actions

- Enable search.
- Set routing.
- Export to case resolution.
- Publish the article.
- Create an article.
- Mark for review.
- Approve the article.

### Answer Area



Explanation:

Create an article.

Mark for review.

Approve the article.

Publish the article.

Reference:

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

**NO.8** You need to configure the queue for telephone-based cases.

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. Create a case from email.
- B. Define an SLA and entitlements and set entitlement values for case numbers.
- C. Configure a status reason transition.
- D. Create a case routing rule.
- E. Automatically create or update records.

**Answer:** B C

**NO.9** 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.

- 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

**Answer:** B D E

Explanation:

Plan	Response time
HMO	24 hours
PPO	6 business hours
Gold	1 business hour

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

**NO.10** You need to ensure that claim disputes conform to the defined case life cycle.

What should you configure?

- A. Related cases
- B. Case Relationships
- C. Timeline
- D. Status Reason Transition
- E. Subject

**Answer:** D

Topic 2, Lamna HealthCare

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

- \* Each employee must use the system.
- \* Case managers must be users in the system but must not be available for the scheduling rotation or manually assigned.
- \* Patients must be offered at least three alternative times to schedule an appointment.

Requirements. Cases

- \* The system must support live chats, texting, and Twitter.
- \* Case representatives must be able to chat, text, and tweet without exiting the system they use to track calls.
- \* Case representatives must be able to chat live only with customers whose calls are routed or assigned to them.
- \* Managers must be able to monitor all communication as well as add or delete quick replies.
- \* Customer satisfaction representatives must be able to read agent scripts and workflows.
- \* 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.
- \* There are two type of queues: regular and escalated.
- \* Tickets must be routed to the most qualified representative for the illness.
- \* Tickets assigned to a representative must be automatically placed in that representative ' s queue.

Requirements. Chat escalation process

- \* Each division must have one manager for escalations.
- \* 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.
- \* Only escalations must go to the chat bot.
- \* You must create two types of Omnichannel queues: regular and escalated.
- \* Only managers must be able to access the Omnichannel Insights dashboard.

Requirements. Managers

- \* Managers must be able to review weekly productivity reports for representatives by using Omnichannel Insights dashboards.
- \* Managers must be able to monitor patient moods during patients' conversations with representatives.
- \* Managers must be able to determine whether a patient is feeling negative during a live chat with a representative.

Requirements. Appointments

- \* Representatives must be able to schedule appointments and see everyone ' s free/busy time during their scheduled working hours.
- \* Appointments must be scheduled by representatives in open time slots for nurses and doctors.
- \* Nurses and doctors must be booked for 30-minute time slots.

\* Patients must be offered at least three alternative times to schedule an appointment.

Requirements. Analytics

\* You must implement Customer Insights to keep track of how well representatives are managing customers' requests.

\* Analytics must be viewable only in the production environment.

\* You must ensure that only escalation managers can create workspaces and control access to workspaces

\* Case representatives must be rated on knowledge of their primary specialty and their backup specialty.

\* Case representatives must only be able to view workspaces.

\* Managers must be able to review dashboards in the Chat channel to ensure that case representatives are meeting their objectives.

**NO.11** You need to configure the system to notify managers about unhappy patients.

What should you do?

**A.** Configure Omnichannel Insights.

**B.** Set a routing rule for escalations.

**C.** Change the value of the Monitor real-time customer sentiment option to Yes .

**Answer:** C

Reference:

<https://docs.microsoft.com/en-us/dynamics365/customer-service/oc-monitor-real-time-customer-sentimentsessions>

**NO.12** You need to set up users with permissions to use the digital messaging channels.

Which role should you assign to each user? To answer, drag the appropriate roles to the correct groups of users. Each role 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.

Roles	Answer Area	Role
Omnichannel supervisor	Group of users	
Omnichannel agent	Case managers	
Productivity tools user	Case representatives	
Productivity tools administrator	Customer satisfaction representatives	

**Answer:**

Roles	Answer Area	Role
Omnichannel supervisor	Group of users	Omnichannel supervisor
Omnichannel agent	Case managers	Omnichannel agent
Productivity tools user	Case representatives	Productivity tools user
Productivity tools administrator	Customer satisfaction representatives	

Explanation:

Box 1: Omnichannel supervisor

Case managers schedule shifts and are a point of escalation.

Omnichannel supervisor: Required for performing supervisor tasks.

Businesses need to monitor and manage the efficiency levels of agents in their ongoing conversations with customers. The enhanced supervisor experience provides supervisors with timely insights and metrics on the efficiency of the service delivery of agents and opportunities to help agents deliver better support to customers.

In this enhancement to the supervisor experience in Omnichannel for Customer Service, supervisors can:

Drill down to specific agents and look at their operational metrics.

Manage agent availability remotely.

Box 2: Omnichannel agent

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.

Omnichannel agent: Required for performing agent tasks.

As an Omnichannel agent, you can use queues to manage the work items that are assigned to you via queues.

Therefore, you can focus on the tasks at hand and ensure better customer service. The application empowers you to work on simultaneous conversations with multiple customers. You get a holistic view of a customer 's data and can see the details of the customer 's previous interactions. In this way, you can be sure that you have all the available information that you might need to resolve the customer 's issue.

Box 3: Productive tools user

Customer satisfaction representatives monitor all activity and ensure that there is a uniform process for all calls.

Productivity tools user: Required by users of Dynamics 365 Productivity Tools.

Agent productivity tools use intelligence and automation to enable agents to find answers to customer questions and help resolve customer issues quickly, thereby improving satisfaction in service delivery.

Incorrect:

Not Productivity tools administrator:

Productivity tools administrator: Required by administrator users of Dynamics 365 Productivity Tools.

Reference:

<https://docs.microsoft.com/en-us/dynamics365/customer-service/omnichannel-agent-overview>

<https://docs.microsoft.com/en-us/dynamics365-release-plan/2020wave1/dynamics365-customer-service>

[/omnichannel-supervisor-experience-enhancements](https://docs.microsoft.com/en-us/dynamics365-release-plan/2020wave1/dynamics365-customer-service/omnichannel-supervisor-experience-enhancements)

<https://docs.microsoft.com/en-us/dynamics365-release-plan/2021wave1/service/dynamics365-customer-service/agent-productivity>

**NO.13** What should managers use to perform weekly reviews with case representatives?

- A. Tier 1 dashboard
- B. Agent Insights
- C. Connected Customer Service dashboard
- D. Customer Service Performance dashboard

**Answer:** B

Reference:

<https://docs.microsoft.com/en-us/dynamics365/customer-service/intraday-agents-insights>

**NO.14** 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.

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

**Answer:**

**Scenario**

**Configuration**

Escalation workstreams

One routing rule that includes both escalations and regular tickets
Two routing rules: one for escalations and one for regular tickets
Code snippet to engage a bot
Bot channel from the Microsoft Azure portal

Escalation handling tool

Power Virtual Agents
Unified Service Desk
Customer Service Insights
Customer Insights

Explanation:

**Scenario**

**Configuration**

Escalation workstreams

One routing rule that includes both escalations and regular tickets
Two routing rules: one for escalations and one for regular tickets
Code snippet to engage a bot
Bot channel from the Microsoft Azure portal

Escalation handling tool

Power Virtual Agents
Unified Service Desk
Customer Service Insights
Customer Insights

Reference:

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

**NO.15** You need to select which setting needs to be configured for each setup. Which settings should you select? To answer, select the appropriate options in the answer area. NOTE: Each correct selection is worth one point.

**Setup**

**Setting**

Ticket routing

Workstream
Rating Model
Bookable Resource Characteristic Type
Resource Category

Representative specialty

Workstream
Rating Model
Bookable Resource Characteristic Type
Resource Category

Spanish

Workstream
Rating Model
Bookable Resource Characteristic Type

**Answer:**

**Setup**

**Setting**

Ticket routing

▼

Workstream
Rating Model
Bookable Resource Characteristic Type
Resource Category

Representative specialty

▼

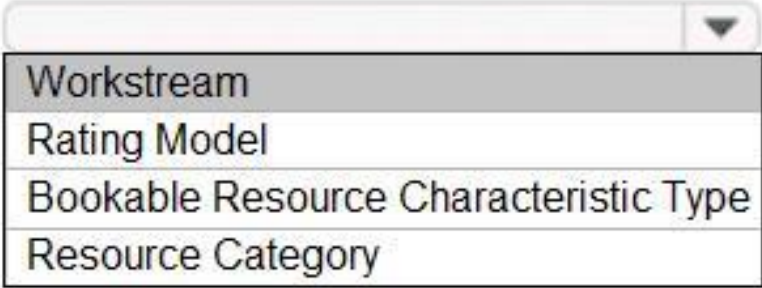
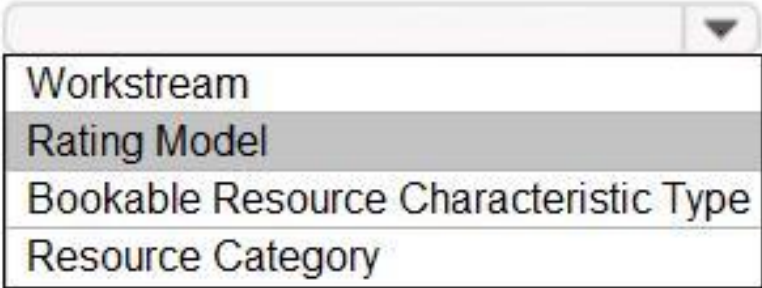
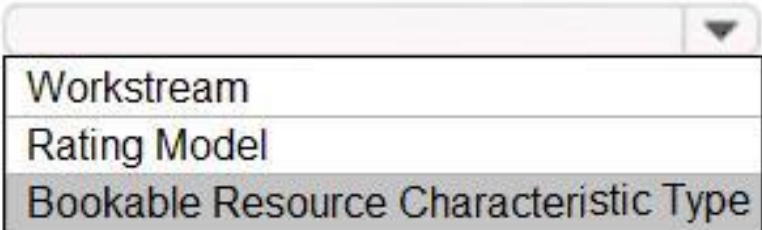
Workstream
Rating Model
Bookable Resource Characteristic Type
Resource Category

Spanish

▼

Workstream
Rating Model
Bookable Resource Characteristic Type

Explanation:

Setup	Setting
Ticket routing	 <ul style="list-style-type: none"><li>Workstream</li><li>Rating Model</li><li>Bookable Resource Characteristic Type</li><li>Resource Category</li></ul>
Representative specialty	 <ul style="list-style-type: none"><li>Workstream</li><li>Rating Model</li><li>Bookable Resource Characteristic Type</li><li>Resource Category</li></ul>
Spanish	 <ul style="list-style-type: none"><li>Workstream</li><li>Rating Model</li><li>Bookable Resource Characteristic Type</li></ul>

Reference:

<https://docs.microsoft.com/en-us/dynamics365/customer-service/create-workstreams>

<https://docs.microsoft.com/en-us/dynamics365/customer-service/enable-skill-routing-create-rating-model>

**NO.16** You need to configure the system to meet the workspace requirements for case representatives.

Which role should you assign to case representatives?

- A. Owner
- B. Maker
- C. Viewer
- D. Customer Service Schedule Administrator
- E. CSR Manager

**Answer:** C

**NO.17** You need to select the feature for each parameter.

Which feature should you use for each parameter? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Parameter	Feature
Phone Representatives	<div style="border: 1px solid black; padding: 2px;"> <div style="border: 1px solid black; padding: 2px; margin-bottom: 2px;">Service activities</div> <div style="border: 1px solid black; padding: 2px; margin-bottom: 2px;">Schedule board</div> <div style="border: 1px solid black; padding: 2px;">Work hours</div> </div>
New Year's Day	<div style="border: 1px solid black; padding: 2px;"> <div style="border: 1px solid black; padding: 2px; margin-bottom: 2px;">Customer service calendar</div> <div style="border: 1px solid black; padding: 2px; margin-bottom: 2px;">Holiday calendar</div> <div style="border: 1px solid black; padding: 2px;">Business closures</div> </div>
Business Hours	<div style="border: 1px solid black; padding: 2px;"> <div style="border: 1px solid black; padding: 2px; margin-bottom: 2px;">Customer service calendar</div> <div style="border: 1px solid black; padding: 2px; margin-bottom: 2px;">Holiday calendar</div> <div style="border: 1px solid black; padding: 2px;">Business closures</div> </div>

**Answer:**

Parameter	Feature
Phone Representatives	<div style="border: 1px solid black; padding: 2px;"> <div style="border: 1px solid black; padding: 2px; margin-bottom: 2px;">Service activities</div> <div style="border: 1px solid black; padding: 2px; margin-bottom: 2px;">Schedule board</div> <div style="border: 1px solid black; padding: 2px;">Work hours</div> </div>
New Year's Day	<div style="border: 1px solid black; padding: 2px;"> <div style="border: 1px solid black; padding: 2px; margin-bottom: 2px;">Customer service calendar</div> <div style="border: 1px solid black; padding: 2px; margin-bottom: 2px;">Holiday calendar</div> <div style="border: 1px solid black; padding: 2px;">Business closures</div> </div>
Business Hours	<div style="border: 1px solid black; padding: 2px;"> <div style="border: 1px solid black; padding: 2px; margin-bottom: 2px;">Customer service calendar</div> <div style="border: 1px solid black; padding: 2px; margin-bottom: 2px;">Holiday calendar</div> <div style="border: 1px solid black; padding: 2px;">Business closures</div> </div>

Explanation:

Parameter	Feature
Phone Representatives	<div style="border: 1px solid black; padding: 5px;"> <div style="border: 1px solid black; background-color: #f0f0f0; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> <span></span> <span>▼</span> </div> <div style="border: 1px solid black; padding: 2px;"> <p>Service activities</p> <p>Schedule board</p> <p>Work hours</p> </div> </div>
New Year's Day	<div style="border: 1px solid black; padding: 5px;"> <div style="border: 1px solid black; background-color: #f0f0f0; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> <span></span> <span>▼</span> </div> <div style="border: 1px solid black; padding: 2px;"> <p>Customer service calendar</p> <p>Holiday calendar</p> <p>Business closures</p> </div> </div>
Business Hours	<div style="border: 1px solid black; padding: 5px;"> <div style="border: 1px solid black; background-color: #f0f0f0; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> <span></span> <span>▼</span> </div> <div style="border: 1px solid black; padding: 2px;"> <p>Customer service calendar</p> <p>Holiday calendar</p> <p>Business closures</p> </div> </div>

Reference:

<https://docs.microsoft.com/en-us/dynamics365/customer-service/create-operating-hours>

**NO.18** You need to configure OmniChannel to route correctly. Which options should you use? To answer, select the appropriate options in the answer area. NOTE: Each correct selection is worth one point.

**Configuration**

**Option**

Number of work streams

	▼
None	
One	
Two	
Three	

Ticket placement on assignment

	▼
Select the Automatically move records in queue checkbox in the case entity in the solution	
Add a routing rule for a push on owner assignment in Omnichannel	
Ass a work stream for a push on owner assignment in Omnichannel	
Select the Enable for SLA checkbox in the case entity in the solution	

**Answer:**

**Configuration**

**Option**

Number of work streams

	▼
None	
One	
Two	
Three	

Ticket placement on assignment

	▼
Select the Automatically move records in queue checkbox in the case entity in the solution	
Add a routing rule for a push on owner assignment in Omnichannel	
Ass a work stream for a push on owner assignment in Omnichannel	
Select the Enable for SLA checkbox in the case entity in the solution	

Explanation:

Box 1: Two

You must create two types of Omnichannel queues: regular and escalated.

Box 2: Add a routing rule for a push on owner assignment in Omnichannel Tickets assigned to a representative must be automatically placed in that representative 's queue.

A customer initiates a conversation from the portal, and the conversation reaches the Omnichannel system.

Now, based on the routing rules condition defined in the routing system, it starts routing the conversation to the appropriate queues.

When the conversation reaches to the queues, the work assignment system assigns the conversation based on triggers.

Reference:

<https://docs.microsoft.com/en-us/dynamics365/customer-service/routing-work-distribution-oca>

**NO.19** You need to configure the options for the schedule.

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

NOTE: Each correct selection is worth one point.

**Setting**

**Option**

Resource Type

	▼
User	
Account	
Contact	
Facility	

Vice Presidents' schedule

	▼
Clear the Display on Schedule Board check box.	
Clear the Enable for Availability check box.	
Set the schedule to User is not working.	
Set the Service Restriction.	

**Answer:**

Setting	Option
Resource Type	<div style="border: 1px solid black; padding: 5px;"> <div style="border-bottom: 1px solid black; padding: 2px 5px;">User</div> <div style="border-bottom: 1px solid black; padding: 2px 5px;">Account</div> <div style="border-bottom: 1px solid black; padding: 2px 5px;">Contact</div> <div style="padding: 2px 5px;">Facility</div> </div>
Vice Presidents' schedule	<div style="border: 1px solid black; padding: 5px;"> <div style="border-bottom: 1px solid black; padding: 2px 5px;">Clear the Display on Schedule Board check box.</div> <div style="border-bottom: 1px solid black; padding: 2px 5px;">Clear the Enable for Availability check box.</div> <div style="border-bottom: 1px solid black; padding: 2px 5px;">Set the schedule to User is not working.</div> <div style="padding: 2px 5px;">Set the Service Restriction.</div> </div>

Explanation:

Setting	Option
Resource Type	<div style="border: 1px solid black; padding: 5px;"> <div style="border-bottom: 1px solid black; padding: 2px 5px; background-color: #e0e0e0;">User</div> <div style="border-bottom: 1px solid black; padding: 2px 5px;">Account</div> <div style="border-bottom: 1px solid black; padding: 2px 5px;">Contact</div> <div style="padding: 2px 5px;">Facility</div> </div>
Vice Presidents' schedule	<div style="border: 1px solid black; padding: 5px;"> <div style="border-bottom: 1px solid black; padding: 2px 5px; background-color: #e0e0e0;">Clear the Display on Schedule Board check box.</div> <div style="border-bottom: 1px solid black; padding: 2px 5px;">Clear the Enable for Availability check box.</div> <div style="border-bottom: 1px solid black; padding: 2px 5px;">Set the schedule to User is not working.</div> <div style="padding: 2px 5px;">Set the Service Restriction.</div> </div>

Reference:

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

**NO.20** You need to set up the analytics functionality.

What should you do?

- A. Select the System Management menus and configure them in the settings.
- B. Connect the data through Dynamics 365 Customer Service to Dynamics 365 Customer Service Insights.
- C. Connect the data through Dynamics 365 Customer Service Insights to Dynamics 365 Customer Service.
- D. Install the solution and menu items that will appear in Dynamics 365 Customer Service.
- E. Create a new dashboard in Dynamics 365 Customer Service and select the correct information.

**Answer:** E

## Explanation:

Customer Service Insights is now embedded in Dynamics 365 Customer Service. After it is enabled, this experience allows you to start seeing historical analytics directly within the Customer Service environment.

Several reports and dashboards can be viewed by your management team.

## Reference:

<https://docs.microsoft.com/en-us/dynamics365/customer-service/introduction-customer-service-analytics>

## Topic 3, The Phone Company

## 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.

## Overview

The Phone Company provides mobile devices and services to corporate clients. Each client corporation has different agreements and service level agreements (SLAs) in place. Most clients have agreements that last one year and have 30 cases available. Half the cases may be opened by phone. The other half may be opened by email.

The company has an existing on-premises software system. The current system no longer meets the company's needs.

The support desk is open 8:00 am to 8:00 pm Eastern Standard Time.

## Requirements

## Support desk

The company plans to implement Dynamics 365. The solution will include a custom entity that needs to be search enabled.

You must configure the system to ensure that you can determine how many support tickets and new orders tickets are received. You must be able to determine which device types have the most tickets opened for issues. Business hours in the system must reflect the hours support staff is scheduled.

## Case handling

\* New cases must automatically route to the correct support group by phone type or new purchase

group without requiring custom code.

- \* The system must automatically create a case when email is received by companies that are not in the system.
- \* The system must automatically send a response to an email sender upon case creation for new orders, but not for service records.
- \* Users must be able to initiate routing for manually created cases.
- \* The system must create sub-cases from one customer with different cases and also if the same issue is reported by several customers. Subcases must inherit the following fields: customer name, contact email address and case title.
- \* Main cases must not be closed until all the sub-cases are closed.
- \* Separate groups must be created for each type of service and each phone type. Access to the groups must be restricted to team members that support that service or phone type.
- \* When importing from the old system, old cases do not need to be routed to the correct support group.

Knowledge base

- \* Users must be able to search the knowledge base when opening a new case form or when checking on cases.
- \* Users must be able to use relevant searches and include any customer entities.

Dashboards

- \* Managers must be able to see a real-time list of open cases, open activities, and expiring entitlements all on one page.
- \* Managers must also be able to see all open cases, escalated cases and cases by representatives on one screen. Managers must be able to drill down within each area.
- \* Managers need a dashboard that displays weekly statistics for cases and representatives.
- \* Each representative needs to see their own tickets that are opened for the day, week, and month as well as their closed tickets.

Service-level agreements

- \* Most customers must be contacted within 90 minutes of their case being opened.
- \* Some customers can purchase faster service on call backs.
- \* Emails must be sent to support managers when service-level agreements (SLAs) are missed.
- \* Support representatives must be able to see a timer on each case form to ensure they are adhering to their SLAs.
- \* SLA KPIs must be tracked in the system.
- \* SLA KPIs must appear on the case form.
- \* Cases must be able to be placed on hold if issues arise with related contracts.

Issues

Users report they are not able to search the Knowledge Base.

**NO.21** You need to ensure users can search the knowledge base from a case record. Which two actions should you perform? Each correct answer presents part of the solution. NOTE: Each correct selection is worth one point.

- A.** Add Knowledge Base Search control to the dashboard.
- B.** Check Knowledge Management from the case entity in the solution.
- C.** Insert the Knowledge Base Search control on the form.
- D.** Select the Knowledge Base Search control from the entity.
- E.** Add the Quick Find option to the views.

**Answer:** B C

**NO.22** You need to create the queue for cases.

What type of queue should you create?

- A. Teams
- B. Public
- C. Product
- D. Private
- E. Service

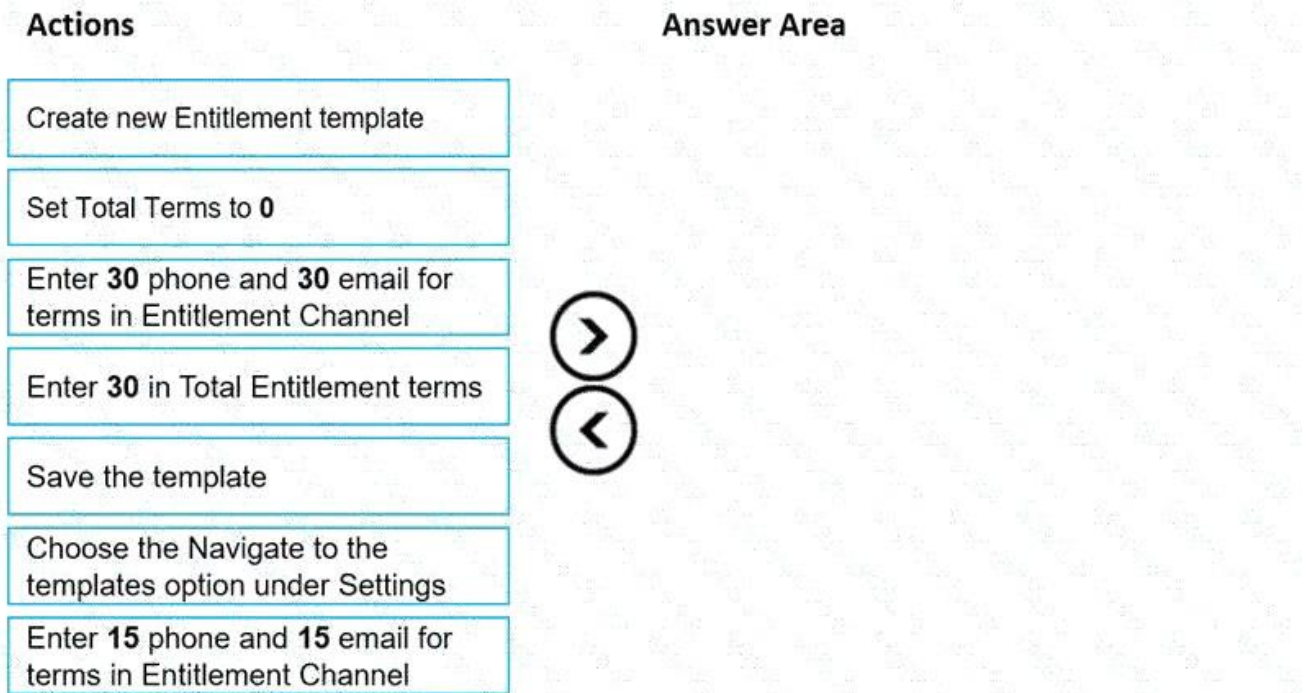
**Answer:** D

Reference:

<https://docs.microsoft.com/en-us/dynamics365/customer-service/set-up-queues-manage-activities-cases>

**NO.23** You need to create an entitlement template. In System Settings, you navigate to Service Management.

Which four 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	Answer Area
Create new Entitlement template	
Set Total Terms to 0	
Enter 30 phone and 30 email for terms in Entitlement Channel	
Enter 30 in Total Entitlement terms	
Save the template	
Choose the Navigate to the templates option under Settings	
Enter 15 phone and 15 email for terms in Entitlement Channel	

**Answer:**

**Actions**

- Create new Entitlement template
- Set Total Terms to 0
- Enter **30** phone and **30** email for terms in Entitlement Channel
- Enter **30** in Total Entitlement terms
- Save the template
- Choose the Navigate to the templates option under Settings
- Enter **15** phone and **15** email for terms in Entitlement Channel

**Answer Area**

- Create new Entitlement template
- Enter **30** in Total Entitlement terms
- Enter **15** phone and **15** email for terms in Entitlement Channel
- Save the template

Explanation:

- Create new Entitlement template
- Enter **30** in Total Entitlement terms
- Enter **15** phone and **15** email for terms in Entitlement Channel
- Save the template

Reference:

<https://docs.microsoft.com/en-us/dynamics365/customer-service/setup-entitlements-templates>

**NO.24** You are a Dynamics 365 system administrator.

The customer service desk needs to be able to apply service level agreements (SLAs) on demand to customers that do not have SLAs.

You need to determine how SLAs on demand can be assigned.

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.** Use an existing customer SLA and change the conditions after assigning the SLA to the customer record.
- B.** Create a new SLA for each case that does not have a customer SLA.
- C.** Go into the SLA configuration and assign it to a customer.

**D.** Automatically apply SLAs to records based on business logic.

**E.** Assign SLAs manually to records.

**Answer:** D E

Explanation:

Apply SLAs on demand.

With the enhancements made to SLAs, you can now apply SLAs to records manually. You can also automatically apply SLAs to records based on your business logic by using workflows or custom plug-ins.

Reference:

<https://docs.microsoft.com/en-us/dynamics365/customer-service/define-service-level-agreements>

**NO.25** You need to create the dashboards.

Which dashboard types should you use? To answer, drag the appropriate dashboard types to the correct scenario. Each dashboard type 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.

NOTE: Each correct selection is worth one point.

Dashboard types	Scenario	Dashboard type
multi-stream dashboard only	Dashboard for managers with streams for cases, activities, and representatives	
single-stream dashboard only	Dashboard for cases only	
multi-stream or single-stream dashboards	Dashboard for representatives	
	Dashboard for the week	

**Answer:**

Dashboard types	Scenario	Dashboard type
multi-stream dashboard only	Dashboard for managers with streams for cases, activities, and representatives	multi-stream dashboard only
single-stream dashboard only	Dashboard for cases only	multi-stream dashboard only
multi-stream or single-stream dashboards	Dashboard for representatives	multi-stream or single-stream dashboards
	Dashboard for the week	multi-stream or single-stream dashboards

Explanation:

Scenario	Dashboard type
Dashboard for managers with streams for cases, activities, and representatives	multi-stream dashboard only
Dashboard for cases only	multi-stream dashboard only
Dashboard for representatives	multi-stream or single-stream dashboards
Dashboard for the week	multi-stream or single-stream dashboards

Reference:

<https://docs.microsoft.com/en-us/dynamics365/customer-service/customer-service-hub-user-guide-dashboard>

**NO.26** You need to ensure cases are handled correctly. What should you do? To answer, select the appropriate options in the answer area. NOTE: Each correct selection is worth one point.

Requirement	Action
Handle incoming cases	<div style="border: 1px solid black; padding: 5px;"> <div style="text-align: right; border-bottom: 1px solid black;">▼</div> <div style="padding: 2px;"> <p>Create an automatic workflow</p> <p>Create a plugin</p> <p>Create a routing rule</p> <p>Create a menu option</p> </div> </div>
Import all classes from old system per requirements	<div style="border: 1px solid black; padding: 5px;"> <div style="text-align: right; border-bottom: 1px solid black;">▼</div> <div style="padding: 2px;"> <p>In the Add Route Case for the import file, add the value no for all records</p> <p>In the Add Route Case for the import file, add the value yes for all records</p> <p>In spreadsheet for column Add Route Case add the value No Routing for all records</p> <p>Manually add each record</p> </div> </div>
Route cases that are entered manually	<div style="border: 1px solid black; padding: 5px;"> <div style="text-align: right; border-bottom: 1px solid black;">▼</div> <div style="padding: 2px;"> <p>Use an existing routing rule</p> <p>Create a second routing rule</p> <p>Create a workflow that is set as an on-demand process</p> <p>Use existing plugin</p> </div> </div>

**Answer:**

Requirement	Action
Handle incoming cases	<div style="border: 1px solid black; padding: 5px;"> <div style="text-align: right; border-bottom: 1px solid black;">▼</div> <div style="padding: 2px;">Create an automatic workflow</div> <div style="padding: 2px;">Create a plugin</div> <div style="padding: 2px;">Create a routing rule</div> <div style="padding: 2px;">Create a menu option</div> </div>
Import all classes from old system per requirements	<div style="border: 1px solid black; padding: 5px;"> <div style="text-align: right; border-bottom: 1px solid black;">▼</div> <div style="padding: 2px;">In the Add Route Case for the import file, add the value no for all records</div> <div style="padding: 2px;">In the Add Route Case for the import file, add the value yes for all records</div> <div style="padding: 2px;">In spreadsheet for column Add Route Case add the value No Routing for all records</div> <div style="padding: 2px;">Manually add each record</div> </div>
Route cases that are entered manually	<div style="border: 1px solid black; padding: 5px;"> <div style="text-align: right; border-bottom: 1px solid black;">▼</div> <div style="padding: 2px;">Use an existing routing rule</div> <div style="padding: 2px;">Create a second routing rule</div> <div style="padding: 2px;">Create a workflow that is set as an on-demand process</div> <div style="padding: 2px;">Use existing plugin</div> </div>

Explanation:

Requirement	Action
Handle incoming cases	<div style="border: 1px solid black; padding: 5px;"> <div style="text-align: right; border-bottom: 1px solid black;">▼</div> <div style="padding: 2px;">Create an automatic workflow</div> <div style="padding: 2px;">Create a plugin</div> <div style="padding: 2px; background-color: #e0e0e0;">Create a routing rule</div> <div style="padding: 2px;">Create a menu option</div> </div>
Import all classes from old system per requirements	<div style="border: 1px solid black; padding: 5px;"> <div style="text-align: right; border-bottom: 1px solid black;">▼</div> <div style="padding: 2px; background-color: #e0e0e0;">In the Add Route Case for the import file, add the value no for all records</div> <div style="padding: 2px;">In the Add Route Case for the import file, add the value yes for all records</div> <div style="padding: 2px;">In spreadsheet for column Add Route Case add the value No Routing for all records</div> <div style="padding: 2px;">Manually add each record</div> </div>
Route cases that are entered manually	<div style="border: 1px solid black; padding: 5px;"> <div style="text-align: right; border-bottom: 1px solid black;">▼</div> <div style="padding: 2px; background-color: #e0e0e0;">Use an existing routing rule</div> <div style="padding: 2px;">Create a second routing rule</div> <div style="padding: 2px;">Create a workflow that is set as an on-demand process</div> <div style="padding: 2px;">Use existing plugin</div> </div>

Reference:

<https://docs.microsoft.com/en-us/dynamics365/customer-service/overview-unified-routing>

**NO.27** You need to decide which action is applicable in the SLA.

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

NOTE: Each correct selection is worth one point.

Scenario	Action										
A customer has a default SLA	<table border="1"> <tr><td></td><td>▼</td></tr> <tr><td>Set Success Criteria to 1,5 hours</td><td></td></tr> <tr><td>Set Item failure to 1,5 hours</td><td></td></tr> <tr><td>Set Applicable when to 1,5 hours</td><td></td></tr> </table>		▼	Set Success Criteria to 1,5 hours		Set Item failure to 1,5 hours		Set Applicable when to 1,5 hours			
	▼										
Set Success Criteria to 1,5 hours											
Set Item failure to 1,5 hours											
Set Applicable when to 1,5 hours											
The SLA time is exceeded	<table border="1"> <tr><td></td><td>▼</td></tr> <tr><td>Set Success Criteria to email customer</td><td></td></tr> <tr><td>Set Item Failure to email customer</td><td></td></tr> <tr><td>Set Warning Action to email customer</td><td></td></tr> <tr><td>Set Failure Action to email customer</td><td></td></tr> </table>		▼	Set Success Criteria to email customer		Set Item Failure to email customer		Set Warning Action to email customer		Set Failure Action to email customer	
	▼										
Set Success Criteria to email customer											
Set Item Failure to email customer											
Set Warning Action to email customer											
Set Failure Action to email customer											
A customer with a default SLA calls at Monday at 7:30 pm EST	<table border="1"> <tr><td></td><td>▼</td></tr> <tr><td>Resolve case before Monday 9:00 pm EST so there is no SLA failure</td><td></td></tr> <tr><td>Resolve case before at Tuesday 9:00 am EST so there is no SLA failure</td><td></td></tr> <tr><td>Resolve case by Tuesday 8:00 am EST so there is no SLA failure</td><td></td></tr> <tr><td>Resolve case by Tuesday at 9:00 pm EST so there is no SLA failure</td><td></td></tr> </table>		▼	Resolve case before Monday 9:00 pm EST so there is no SLA failure		Resolve case before at Tuesday 9:00 am EST so there is no SLA failure		Resolve case by Tuesday 8:00 am EST so there is no SLA failure		Resolve case by Tuesday at 9:00 pm EST so there is no SLA failure	
	▼										
Resolve case before Monday 9:00 pm EST so there is no SLA failure											
Resolve case before at Tuesday 9:00 am EST so there is no SLA failure											
Resolve case by Tuesday 8:00 am EST so there is no SLA failure											
Resolve case by Tuesday at 9:00 pm EST so there is no SLA failure											

**Answer:**

Scenario	Action										
A customer has a default SLA	<table border="1"> <tr><td></td><td>▼</td></tr> <tr><td>Set Success Criteria to 1,5 hours</td><td></td></tr> <tr><td>Set Item failure to 1,5 hours</td><td></td></tr> <tr><td>Set Applicable when to 1,5 hours</td><td></td></tr> </table>		▼	Set Success Criteria to 1,5 hours		Set Item failure to 1,5 hours		Set Applicable when to 1,5 hours			
	▼										
Set Success Criteria to 1,5 hours											
Set Item failure to 1,5 hours											
Set Applicable when to 1,5 hours											
The SLA time is exceeded	<table border="1"> <tr><td></td><td>▼</td></tr> <tr><td>Set Success Criteria to email customer</td><td></td></tr> <tr><td>Set Item Failure to email customer</td><td></td></tr> <tr><td>Set Warning Action to email customer</td><td></td></tr> <tr><td>Set Failure Action to email customer</td><td></td></tr> </table>		▼	Set Success Criteria to email customer		Set Item Failure to email customer		Set Warning Action to email customer		Set Failure Action to email customer	
	▼										
Set Success Criteria to email customer											
Set Item Failure to email customer											
Set Warning Action to email customer											
Set Failure Action to email customer											
A customer with a default SLA calls at Monday at 7:30 pm EST	<table border="1"> <tr><td></td><td>▼</td></tr> <tr><td>Resolve case before Monday 9:00 pm EST so there is no SLA failure</td><td></td></tr> <tr><td>Resolve case before at Tuesday 9:00 am EST so there is no SLA failure</td><td></td></tr> <tr><td>Resolve case by Tuesday 8:00 am EST so there is no SLA failure</td><td></td></tr> <tr><td>Resolve case by Tuesday at 9:00 pm EST so there is no SLA failure</td><td></td></tr> </table>		▼	Resolve case before Monday 9:00 pm EST so there is no SLA failure		Resolve case before at Tuesday 9:00 am EST so there is no SLA failure		Resolve case by Tuesday 8:00 am EST so there is no SLA failure		Resolve case by Tuesday at 9:00 pm EST so there is no SLA failure	
	▼										
Resolve case before Monday 9:00 pm EST so there is no SLA failure											
Resolve case before at Tuesday 9:00 am EST so there is no SLA failure											
Resolve case by Tuesday 8:00 am EST so there is no SLA failure											
Resolve case by Tuesday at 9:00 pm EST so there is no SLA failure											

Explanation:

Scenario	Action
A customer has a default SLA	<div style="border: 1px solid black; padding: 5px;"> <div style="border-bottom: 1px solid black; height: 20px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; padding: 2px;">Set Success Criteria to 1,5 hours</div> <div style="border-bottom: 1px solid black; padding: 2px; background-color: #e0e0e0;">Set Item failure to 1,5 hours</div> <div style="padding: 2px;">Set Applicable when to 1,5 hours</div> </div>
The SLA time is exceeded	<div style="border: 1px solid black; padding: 5px;"> <div style="border-bottom: 1px solid black; height: 20px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; padding: 2px;">Set Success Criteria to email customer</div> <div style="border-bottom: 1px solid black; padding: 2px;">Set Item Failure to email customer</div> <div style="border-bottom: 1px solid black; padding: 2px;">Set Warning Action to email customer</div> <div style="padding: 2px; background-color: #e0e0e0;">Set Failure Action to email customer</div> </div>
A customer with a default SLA calls at Monday at 7:30 pm EST	<div style="border: 1px solid black; padding: 5px;"> <div style="border-bottom: 1px solid black; height: 20px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; padding: 2px;">Resolve case before Monday 9:00 pm EST so there is no SLA failure</div> <div style="border-bottom: 1px solid black; padding: 2px; background-color: #e0e0e0;">Resolve case before at Tuesday 9:00 am EST so there is no SLA failure</div> <div style="border-bottom: 1px solid black; padding: 2px;">Resolve case by Tuesday 8:00 am EST so there is no SLA failure</div> <div style="padding: 2px;">Resolve case by Tuesday at 9:00 pm EST so there is no SLA failure</div> </div>

Reference:

<https://docs.microsoft.com/en-us/dynamics365/customer-service/define-service-level-agreements>

**NO.28** You need to implement service-level agreements.

Which type of agreements should you implement?

- A. On-demand
- B. Standard
- C. Enhanced
- D. Contact

**Answer:** C

Reference:

<https://docs.microsoft.com/en-us/dynamics365/customer-service/define-service-level-agreements>

**NO.29** 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.

Scenario	Case Action
Email received about a product issue form an existing customer is not creating a new record	<div style="border: 1px solid black; padding: 5px;"> <div style="border-bottom: 1px solid black; height: 20px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; padding: 2px;">Activate a record creation rule</div> <div style="border-bottom: 1px solid black; padding: 2px;">Click on convert to a case</div> <div style="border-bottom: 1px solid black; padding: 2px;">Activate a record creation plugin</div> <div style="padding: 2px;">Click on new case</div> </div>
Email received from an unknown user about a product issue	<div style="border: 1px solid black; padding: 5px;"> <div style="border-bottom: 1px solid black; height: 20px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; padding: 2px;">Click on convert to case and add account</div> <div style="border-bottom: 1px solid black; padding: 2px;">Choose condition parameter needed in record creation rule</div> <div style="border-bottom: 1px solid black; padding: 2px;">Choose condition parameter in plug-in</div> <div style="padding: 2px;">Click on new case and type in information</div> </div>

**Answer:**

**Scenario**

**Case Action**

Email received about a product issue form an existing customer is not creating a new record

	▼
Activate a record creation rule	
Click on convert to a case	
Activate a record creation plugin	
Click on new case	

Email received from an unknown user about a product issue

	▼
Click on convert to case and add account	
Choose condition parameter needed in record creation rule	
Choose condition parameter in plug-in	
Click on new case and type in information	

Explanation:

**Scenario**

**Case Action**

Email received about a product issue form an existing customer is not creating a new record

	▼
Activate a record creation rule	
Click on convert to a case	
Activate a record creation plugin	
Click on new case	

Email received from an unknown user about a product issue

	▼
Click on convert to case and add account	
Choose condition parameter needed in record creation rule	
Choose condition parameter in plug-in	
Click on new case and type in information	

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/>

**NO.30** You need to add SLA timers to the Case form.

Which two options should you configure? Each correct answer presents part of the solution.

NOTE: Each correct selection is worth one point.

- A. Create Quick View Form in SLA KPI Instance entity.
- B. Create SLA KPI Instance entity.
- C. Create field in case entity with lookup to SLA KPI Instance.
- D. Create Quick View Form in Case entity with reference to the SLA KPI Instance entity.
- E. Insert subgrid from the SLA KPI Instance entity into the Case Main form.

**Answer:** C E

Reference:

<https://docs.microsoft.com/en-us/dynamics365/customer-service/add-timer-control-case-form-track-time-against-sla>

**NO.31** You need to configure the system so that an email is sent to a manager about the SLAs according to the requirements.

What should you configure?

- A. Failure Action
- B. Warning Action
- C. Applicable When
- D. Success Criteria
- E. Success Action

**Answer:** A

Reference:

<https://docs.microsoft.com/en-us/dynamics365/customer-service/define-service-level-agreements>

**NO.32** You need to enable relevance search for the custom entity.

Which two actions should you perform? Each correct answer presents part of the solution.

NOTE: Each correct selection is worth one point.

- A. Add Quick Find to the case form.
- B. Add custom entities to Configure Relevance Search in Customizations and Entities.
- C. Add Knowledge Base Search control to the forms case.
- D. Enable Relevance Search in System Settings.

**Answer:** B

Reference:

<https://carldesouza.com/how-to-use-relevance-search-in-dynamics-365/>

Topic 4, Lamna Healthcare Company (NEW)

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 has a call center for the city. They receive roughly 5,000 calls a day on health issues.

They have the following three departments that take calls daily:

\* Chronic illnesses

- \* Flu-type illnesses

- \* Geriatric illnesses

There is a fourth area that monitors for miscellaneous issues.

They are implementing Dynamics 365 Customer Service.

Requirements. Queues

- \* A queue has to be set up for each department.

- \* Emails must automatically be routed to the appropriate queue.

- \* Miscellaneous queues must be visible to everyone.

- \* The other queues must be visible only to the appropriate department.

- \* If a case is open more than 30 days, the case must automatically be routed to the supervisor.

- \* There must be a button on the queue list screen to route a case to a supervisor if requested.

Requirements. Visualizations

- \* Support representatives must have a real-time view of cases assigned to them, including the status of each case.

- \* Support representatives must be able to see a graphic view of cases by customer that are assigned to them.

Requirements. Knowledge Base

- \* Support representatives must use the knowledge base first to try to solve issues.

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

- \* The knowledge base article that is used to resolve a case must always be sent to the customer.

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

Requirements. Cases

- \* The cases must follow a process that includes identify, research, and resolve.

- \* A confirmation section must be added before the resolve section.

- \* Customers must have contracts that allow them to call Lamna Healthcare 10 times a year for help.

- \* In addition to the 10 free calls, customers must be able to send 15 emails a year for support.

- \* Cases that come in as phone calls must be resolved with seven business days.

- \* Cases that come in as emails must be resolved within three business days.

Requirements. Surveys

- \* Lamna Healthcare sends out about 100,000 surveys a month.

- \* Lamna must use Microsoft Forms Pro for their surveys.

- \* All surveys must have the company logo.

- \* The logo's company colors must not be changed. Any modifications to the graphic or colors is a breach of company policies.

- \* A survey must automatically be sent once a case is resolved.

- \* A manual survey must be sent if a case is escalated.

- \* A survey must not be sent without confirming that it is accurate.

- \* Supervisors must test a survey before it is finalized.

**NO.33** You need to determine the type of queues to create.

How should access to the queues be configured? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

## Queue

## Type

Geriatric queue

	▼
Private	
Public	
Shared	

Miscellaneous

	▼
Private	
Public	
Shared	

**Answer:**

## Queue

## Type

Geriatric queue

	▼
Private	
Public	
Shared	

Miscellaneous

	▼
Private	
Public	
Shared	

Explanation:

Box 1: Private

Miscellaneous queues must be visible to everyone

The other queues must be visible only to the appropriate department.

In Customer Service, you can create two types of queues:

Private queues: Create with limited set of members to help those members easily view the queue items in that queue. Private queues streamline queue items for the members of that queue only and help to remove clutter from other user's views.

Public queues: Create to let everyone in the organization view the queue and all of its items.

Box 2: Public

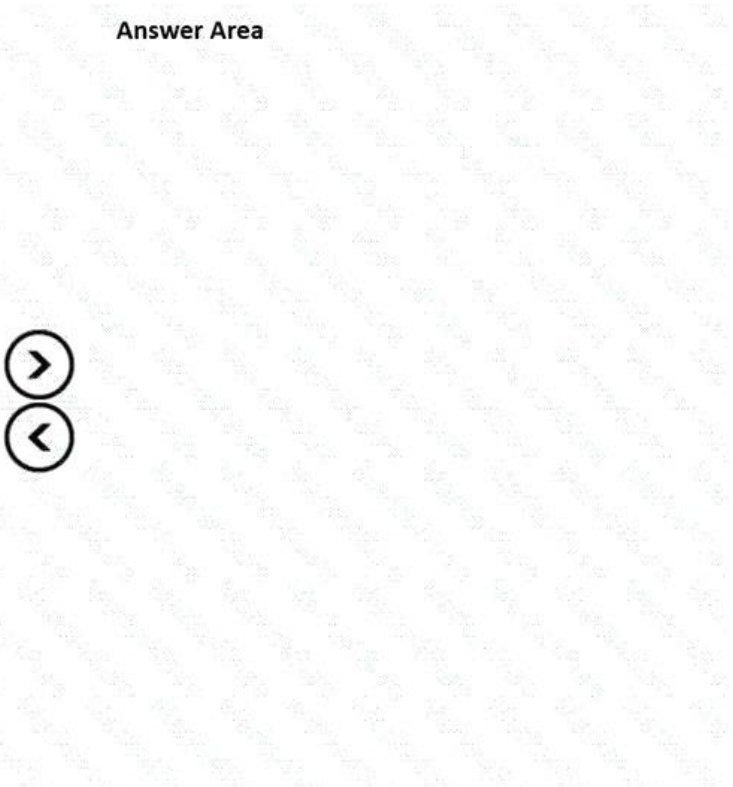
Miscellaneous queues must be visible to everyone.

Reference:

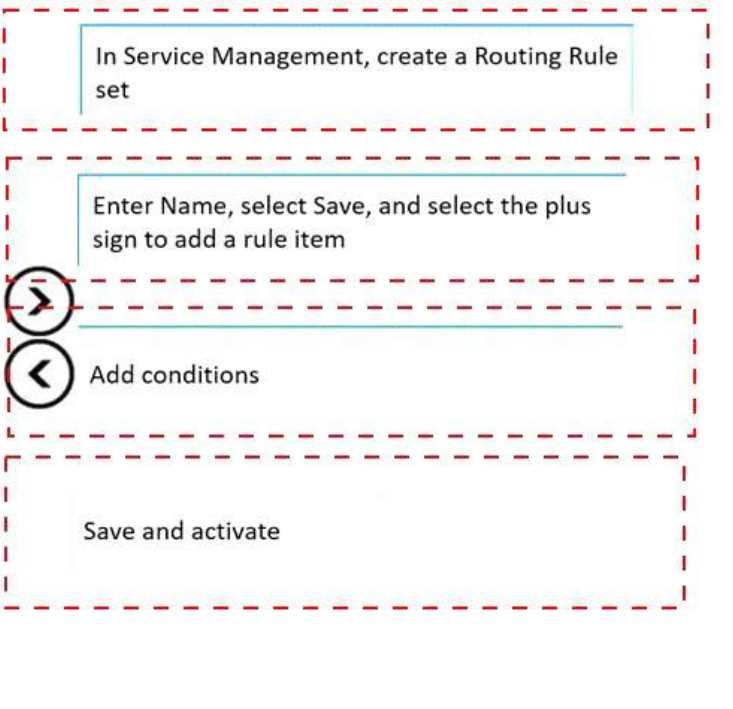
<https://docs.microsoft.com/en-us/dynamics365/customer-service/set-up-queues-manage-activities-cases>

**NO.34** You need to set up the system for cases going to supervisors.

Which four 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	Answer Area
Enter Name and select the plus sign to add rule item	
Publish	
In Service Management, create a Routing Rule set	
Enter Name, select Save, and select the plus sign to add a rule item	
Select Service Management, select Automatic Record creation and Update Rules, and select New	
Add conditions	
Save and activate	

**Answer:**

Actions	Answer Area
Enter Name and select the plus sign to add rule item	
Publish	
In Service Management, create a Routing Rule set	
Enter Name, select Save, and select the plus sign to add a rule item	
Select Service Management, select Automatic Record creation and Update Rules, and select New	
Add conditions	
Save and activate	

**Explanation:**

Step 1: In Service Management, create a Routing Rule set.

Scenario: If a case is open more than 30 days, the case must automatically be routed to the supervisor.

Create routing rulesets to route cases.

Use routing rules in Customer Service to route cases to the right agents at the right time without any

manual intervention. You can also use routing rules to route cases that are escalated to specific queues.

Step 2: Enter Name, Select Save, and select the plus sign to add a rule item On the General tab, in Routing Rule Set Information, Enter Name and Description for the routing ruleset.

Select Save. The routing ruleset is saved, and the Rule Items section is displayed.

In the Rule Items section, select the Add Rule Item button + to specify conditions for routing cases to a queue.

Step 3: Add conditions

Under Then Conditions, specify the queue to which the cases will be routed or the user or team to which the cases will be assigned if the conditions in the If Conditions section are met.

Step 4: Save and activate.

Select Save and Close.

In the routing ruleset record, select Activate so that the ruleset is applied to the cases matching the conditions in the rule.

Reference:

<https://docs.microsoft.com/en-us/dynamics365/customer-service/create-rules-automatically-route-cases>