



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

Microsoft Dynamics 365 Customer Service

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### QUESTION 1

You are creating a Power Virtual Agents chatbot to handle common customer inquiries.

A manager reports that some inquiries are not routing to the appropriate customer service representatives. You observe that one node is inactive.

You need to determine why the node is inactive.

What should you use?

- A. Maker portal
- B. Supervisor dashboard
- C. Test bot pane
- D. Topic checker

Correct Answer: D

Reference: <https://docs.microsoft.com/en-us/power-virtual-agents/authoring-topic-management>

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### QUESTION 2

#### DRAG DROP

A company creates a single-page Power BI visualization to show how a Power Virtual Agents chatbot is performing.

Users must be able to navigate to the charts from anywhere within the Customer Service workspace.

You need to add the Power BI information to the Customer Service workspace app.

Which five 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.

Select and Place:



## Actions

Select **Power BI dashboard** for Type. Enter the Power BI workspace and Power BI report values.

Export the solution, edit the customizations.xml file, and add XML code for the Power BI workspace ID and report ID.

Edit the sitemap, add a new subarea, and add the Power BI page information to the properties of the subarea.

Navigate to the maker portal and create a new solution.

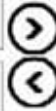
Select **Add Existing** and then select **Dashboard**.

Select **Power BI report** for Type. Enter the Power BI workspace and Power BI report values.

Select **New** and then create a Power BI embedded dashboard.

Save and publish the customization.

## Answer area



Correct Answer:

## Actions

Export the solution, edit the customizations.xml file, and add XML code for the Power BI workspace ID and report ID.

Select **Power BI report** for Type. Enter the Power BI workspace and Power BI report values.

Select **New** and then create a Power BI embedded dashboard.

## Answer area

Navigate to the maker portal and create a new solution.

Select **Add Existing** and then select **Dashboard**.

Select **Power BI dashboard** for Type. Enter the Power BI workspace and Power BI report values.

Edit the sitemap, add a new subarea, and add the Power BI page information to the properties of the subarea.

Save and publish the customization.



Navigate to the maker portal and create a new solution.

Select **Add Existing** and then select **Dashboard**.

Select **Power BI report** for Type. Enter the Power BI workspace and Power BI report values.

Edit the sitemap, add a new subarea, and add the Power BI page information to the properties of the subarea.

Save and publish the customization.

Step 1: Navigate to the maker portal and create a new solution.

Step 2: Select Add Existing and then select Dashboard.

Step 3: Select Power BI Report for type. Enter the Power BI workspace and Power BI report values.

Note: Get the embedding parameter values

To embed your content, you need to obtain certain parameter values. The table below shows the required values, and indicates if they're applicable to the service principal authentication method, the master user authentication method, or both.

Before you embed your content, make sure you have all the values listed below. Some of the values will differ, depending on the authentication method you're using.



Parameter	Service principal	Master user
Client ID	✓	✓
Workspace ID	✓	✓
Report ID	✓	✓
Client secret	✓	✗
Tenant ID	✓	✗
Power BI username	✗	✓
Power BI password	✗	✓

Step 4: Edit the sitemap, add a new subarea, and add the Power BI page information to the properties of the subarea

Edit the default site map

Your environment comes with a default site map. This site map is supported for both custom business apps and Dynamics 365 for Outlook.

In the Dynamics 365 - custom app, go to Settings > Customizations.

Select Customize the System.

In the solution window, under Components, select Client Extensions. Double-click to select the site map that has the display name Site Map and is in a Managed state. You can also select the site map, and then on the toolbar, select Edit.

The site map opens in the site map designer.

Add an area to the site map.

Add a group to the site map.

Add a subarea to a group in the site map.

Select Save.

Select Publish.

Step 5: Save and publish the customization

### QUESTION 3

DRAG DROP



You manage Dynamics 365 Customer Service. You have a routing rule set named CustomerResolution that assigns general inquiry cases to a queue named GeneralInquiry.

You need to assign technical support cases to a queue named TechSupport.

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.

Select and Place:

**Actions**

Create a rule item named **TechSupport** for the routing rule. Then, create a rule criteria and route it to the TechSupport queue

Deactivate the routing rule named CustomerResolution

Create a queue named **TechSupport**

Activate CustomerResolution

Create and activate a routing rule named **TechSupport**

Create a rule item named **CustomerResolution**. Then, create a rule criterion to route items to the TechSupport queue

Activate TechSupport

**Answer Area**

Correct Answer:

**Actions**

Create a rule item named **TechSupport** for the routing rule. Then, create a rule criteria and route it to the TechSupport queue

Create and activate a routing rule named **TechSupport**

Activate TechSupport

**Answer Area**

Create a queue named **TechSupport**

Deactivate the routing rule named CustomerResolution

Create a rule item named **CustomerResolution**. Then, create a rule criterion to route items to the TechSupport queue

Activate CustomerResolution

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

**QUESTION 4**

A customer's entitlement is not available to assign to a case.

You need to determine the cause of the customer's issue.

What are two possible reasons for the issue? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

- A. The entitlement is active
- B. The entitlement is in waiting status
- C. The entitlement is expired
- D. The entitlement was renewed
- E. The entitlement is set as the default

Correct Answer: BC

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





## QUESTION 5

### HOTSPOT

You are using Dynamics 365 Customer Service. You are viewing a knowledge base (KB) article from a case record. Knowledge management is set up to use an external portal.

You need to link the article to the case and share the article with the customer.

What is the solution for each requirement? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

#### Answer Area

Requirement	Solution
Attach and email a KB article from a case.	<div>Select Link article to the case and email content.</div> <div>Link the KB article to the case. The system will automatically email the KB article to customer.</div> <div>Link the KB article to the case. Create an email activity and attach the KB article as a PDF.</div>
Attach a KB article and email a link to the customer.	<div>For the published KB article, select Link the KB article to the case and email the link to the customer.</div> <div>For the approved KB article, select Link the KB article to the case and email the link to the customer.</div> <div>Link the KB article to the case. Create an email activity and select Insert article.</div>

Correct Answer:

#### Answer Area

Requirement	Solution
Attach and email a KB article from a case.	<div>Select Link article to the case and email content.</div> <div>Link the KB article to the case. The system will automatically email the KB article to customer.</div> <div>Link the KB article to the case. Create an email activity and attach the KB article as a PDF.</div>
Attach a KB article and email a link to the customer.	<div>For the published KB article, select Link the KB article to the case and email the link to the customer.</div> <div>For the approved KB article, select Link the KB article to the case and email the link to the customer.</div> <div>Link the KB article to the case. Create an email activity and select Insert article.</div>

Reference: <https://docs.microsoft.com/en-us/dynamics365/customer-service/find-knowledge-articles-within-record-dynamics-365>