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## 2025 High Pass-Rate Microsoft MB-230: Exam Topics Microsoft Dynamics 365 Customer Service Functional Consultant Pdf

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Microsoft MB-230 certification exam is an essential credential for functional consultants who want to demonstrate their skills in implementing and configuring customer service solutions using Dynamics 365. MB-230 Exam covers various topics related to customer service, and passing it can help professionals advance their careers and gain recognition for their expertise.

## Microsoft Dynamics 365 Customer Service Functional Consultant Sample Questions (Q86-Q91):

### NEW QUESTION # 86

A company is implementing Omnichannel for Customer Service.

The company plans to release a new product in the following markets: Germany, Spain, and France.

Before the product launches, one agent from each country/region will receive training on the new product. The agents are included as

part of a new team for the product. Each agent is part of a team specific to the country/region that they serve.

Inquiries about the new product must be routed as follows:

1. Route inquiries to an agent who knows the new product and is fluent in the language of the caller.
2. Route inquiries to an agent who knows the new product but speaks only a bit of the language of the caller.
3. Route inquiries to an agent who speaks all caller languages but does not know the new product.

You need to configure the system.

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

NOTE: Each correct selection is worth one point.

| Requirement                    | Feature  |
|--------------------------------|--|
| Language competency level      | <div>▼</div> <div>Rating model</div> <div>Sentiment analysis</div> <div>Fulfillment requirement</div>                |
| Product competency             | <div>▼</div> <div>Resource category</div> <div>Resource characteristic</div> <div>Resource characteristic type</div> |
| Pool of product trained agents | <div>▼</div> <div>Queue</div> <div>Territory</div> <div>Organizational unit</div>                                    |

**Answer:**

Explanation:

| Requirement                    | Feature  |
|--------------------------------|--|
| Language competency level      | <div>▼</div> <div>Rating model</div> <div>Sentiment analysis</div> <div>Fulfillment requirement</div>                |
| Product competency             | <div>▼</div> <div>Resource category</div> <div>Resource characteristic</div> <div>Resource characteristic type</div> |
| Pool of product trained agents | <div>▼</div> <div>Queue</div> <div>Territory</div> <div>Organizational unit</div>                                    |

Explanation

Graphical user interface, text, application, email Description automatically generated

| Requirement                    | Feature   |
|--------------------------------|---|
| Language competency level      | <div>Rating model</div> <div>Sentiment analysis</div> <div>Fulfillment requirement</div>                |
| Product competency             | <div>Resource category</div> <div>Resource characteristic</div> <div>Resource characteristic type</div> |
| Pool of product trained agents | <div>Queue</div> <div>Territory</div> <div>Organizational unit</div>                                    |

Reference:

<https://docs.microsoft.com/en-us/dynamics365/customer-service/setup-skills-assign-agents>

#### NEW QUESTION # 87

A credit card company uses Dynamics 365 Customer Service. Agents receive conversations through Omnichannel for Customer Service.

A browser-based internal application Drawees, a history of a customer's payments and credit scores, You create an application tab template for the internal application.

if a customer requests a credit limit increase, the agent must use the internal application within Omnichannel for Customer Service to determine eligibility.

Because the internal application requires; maximum) screen space, communications with customers must remain hidden. The internal application must be displayed on the anchor tab.

Once an eligibility check is performed the agent must be able To- chat with the customer again.

You need to create a session template for the company.

How should you configure each area at the template? To answer., select the appropriate options in the answer area. NOTE: Each correct selection is worth one point.

| Answer Area              |   |
|--------------------------|---|
| Session template option  | Session template value  |
| Type                     | <div>Generic</div> <div>Generic</div> <div>Entity</div> <div>Web resource</div>                                       |
| Communication panel mode | <div>Hidden</div> <div>Docked</div> <div>Minimized</div> <div>Hidden</div>  |
| Anchor tab               | <div>Web resource</div> <div>Dashboard</div> <div>Third-party website</div> <div>Web resource</div> <div>Search</div> |

**Answer:**

**Explanation:**

**Answer Area**

The screenshot displays the 'Session template option' and 'Session template value' sections. The 'Session template option' section includes 'Type', 'Communication panel mode', and 'Anchor tab'. The 'Session template value' section shows the corresponding values: 'Generic' for Type, 'Hidden' for Communication panel mode, and 'Web resource' for Anchor tab. The 'Web resource' dropdown is expanded, showing options like 'Dashboard', 'Third-party website', 'Web resource', and 'Search'.

**Explanation**

A picture containing text, font, receipt, screenshot Description automatically generated

The screenshot displays the 'Session template option' and 'Session template value' sections. The 'Session template option' section includes 'Type', 'Communication panel mode', and 'Anchor tab'. The 'Session template value' section shows the corresponding values: 'Generic' for Type, 'Hidden' for Communication panel mode, and 'Web resource' for Anchor tab. The 'Web resource' dropdown is expanded, showing options like 'Dashboard', 'Third-party website', 'Web resource', and 'Search'.

### NEW QUESTION # 88

You are a Dynamics 365 system administrator.

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


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

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

The screenshot displays the 'Actions' section on the left and the 'Answer Area' on the right. The 'Actions' section contains five items: 'Create a new rollup field.', 'Define the metric. Enter metric and amount data types.', 'Specify details about the source data that rolls up.', 'Specify the date field that determines the goal period that the records will roll up into.', and 'Specify the rollup field to track against goals.' The 'Answer Area' is empty, with arrows indicating the correct order of actions.

**Answer:**

**Explanation:**

 **Answer Area**

Define the metric. ENTER metric and amount data types.

Creat a new rolluo field.

Specify the rollup field to track against goals.

Specify details about the source data the rolls up.

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

- 1 - Define the metric. ENter metric and amount data types.
- 2 - Creat a new rolluo field.
- 3 - Specify the rollup field to track against goals.
- 4 - Specify details about the source data the rolls up.
- 5 - Specify the date field that determines the goal period that the records will roll up into.

References:

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

#### NEW QUESTION # 89

You are a Dynamics 365 Customer Service administrator.

You create a new entity named Root Cause Escalation. Queues must be used for new Root Cause Escalation records. The records must be automatically assigned to the record owner's default queue when a record is created.

You need to implement the proper functionality to meet the requirements.

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

#### Actions

#### Answer Area

Create a new rule item named **Assign New RCE Records to Owner Queue**. Create the condition to route new Root Cause Escalation records to the queue of the record owner

Navigate to the Root Cause Escalation entity in Customizations

Create a new routing rule set named **Route RCR Records**

Set the field named Queues to a value of True on the Root Cause Escalation entity

Set the field **Automatically move records to the owner's default queue when a record is created or assigned** to a value of **True**



**Answer:**

**Explanation:**



| Actions  | Answer Area  |
|--|--|
| Create a new rule item named <b>Assign New RCE Records to Owner Queue</b> . Create the condition to route new Root Cause Escalation records to the queue of the record owner | Navigate to the Root Cause Escalation entity in Customizations   |
| Navigate to the Root Cause Escalation entity in Customizations   | Set the field named Queues to a value of True on the Root Cause Escalation entity  |
| Create a new routing rule set named <b>Route RCR Records</b>   | Set the field <b>Automatically move records to the owner's default queue when a record is created or assigned</b> to a value of True |
| Set the field named Queues to a value of True on the Root Cause Escalation entity  |  |
| Set the field <b>Automatically move records to the owner's default queue when a record is created or assigned</b> to a value of True   |  |

Explanation

A picture containing timeline Description automatically generated

Navigate to the Root Cause Escalation entity in Customizations

Set the field named Queues to a value of True on the Root Cause Escalation entity

Set the field **Automatically move records to the owner's default queue when a record is created or assigned** to a value of True

Reference:

<https://docs.microsoft.com/en-us/dynamics365/customer-service/enable-entities-for-queues>

#### NEW QUESTION # 90

You sign in to Dynamics 365 Customer Service as a system administrator. You attempt to configure unified record routing across digital messaging channels.

You receive the following error message:

Some required services need to be installed before unified routing can be turned on. Please contact Microsoft Support.

You need to enable unified record routing and route records.

Which three steps must you perform? Each correct answer presents part of the solution.

NOTE: Each correct selection is worth one point.

- A. Set up users as contacts.

- Answer: B,D,E**

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