MB-230: Microsoft Dynamics 365 Customer Service

Content

Module 1: Customer Service Overview

This module introduces the core concepts of customer service within Microsoft Dynamics 365, including case management, service apps, analytics, AI capabilities, and configuration.

Lessons:

- Create Case Records
- Related Service Apps
- Analytics for Service
- AI for Service
- Configuring Customer Service

Module Summary:

- Understand the basics of customer service in Dynamics 365.
- Learn how to create and manage case records.
- Explore related service apps and their functionalities.
- Utilize analytics and AI tools to enhance service operations.
- Configure customer service settings effectively.

Module 2: Case Management

This module focuses on managing cases within Dynamics 365, including creating and resolving cases, managing queues, and case routing strategies.

Lessons:

- Case Management Overview
- Creating Case Records
- Queue Management
- Case Routing
- Resolving Cases

Module Summary:

- Gain an overview of case management processes.
- Learn how to create and manage case records.
- Manage and route cases using queues.

- Resolve cases efficiently and effectively.

Module 3: Service Level Agreements and Entitlements

This module covers the management of Service Level Agreements (SLAs) and entitlements within Dynamics 365. It includes creating and managing both SLAs and entitlements to ensure effective service delivery.

Lessons:

- SLA and Entitlement Overview
- Create and Manage Entitlements
- Create and Manage SLAs

Module Summary:

- Understand SLAs and entitlements within the customer service context.
- Learn how to create and manage entitlements.
- Create and manage SLAs to meet service expectations.

Module 4: Knowledge Management

This module explores knowledge management in Dynamics 365, including authoring, organizing, and managing knowledge content to support service operations.

Lessons:

- Knowledge Management Overview
- Authoring and Organizing Knowledge Content
- Use Knowledge Content
- Manage Knowledge Content

Module Summary:

- Overview of knowledge management in Dynamics 365.
- Learn how to author and organize knowledge content.
- Utilize and manage knowledge content effectively.