



MB-230T01: Dynamics 365 for Customer Engagement for Customer Service

Course ID #: 7000-402-ZZ-Z

Hours: 7

Course Content

Course Description:

Microsoft Dynamics 365 Customer Service offers any organization an opportunity for customer success. Using tools such as automatic case creation and queue management frees up your time to dedicate it where you can have a greater impact, directly with your customers.

Join our team of globally recognized experts as they take you step by step from creating cases to interacting with customers to resolving those cases. Once you've resolved those cases you can learn from data analysis the key details to help you resolve similar cases faster or avoid new issues altogether.

At Course Completion:

Students will be able to:

- Install and configure the customer service app
- Identify common customer service scenarios
- Complete a case resolution process
- Analyze customer service data
- Automate case management record processing
- Create and use knowledge articles
- Create and use entitlements and service level agreements
- Work with Omnichannel
- Work with Connected Customer Service
- Work with Customer Service Scheduling
- Work with Customer Service Insights

Prerequisites:

This course is designed for functional consultants working with Dynamics 365 Customer Service, or functional consultants who work with other Dynamics 365 apps who want to expand their knowledge of Customer Service.

Target Student:

A Dynamics 365 Customer Engagement Functional Consultant is responsible for performing discovery, capturing requirements, engaging subject matter experts and stakeholders, translating requirements, and configuring the solution and applications. The Functional Consultant implements a solution using out of the box capabilities, codeless extensibility, application and service integrations.



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Topics:

Module 1: Customer Service Overview

- Lesson 1: Create case records
- Lesson 2: Related service apps
- Lesson 3: Analytics for service
- Lesson 4: AI for service
- Lesson 5: Configuring customer service

Module 2: Case Management

- Lesson 1: Case management overview
- Lesson 2: Creating case records
- Lesson 3: Queue management
- Lesson 4: Case routing
- Lesson 5: Resolving cases

Module 3: Service Level Agreements and Entitlements

- Lesson 1: SLA and entitlement overview
- Lesson 2: Create and manage entitlements
- Lesson 3: Create and manage SLAs

Module 4: Knowledge Management

- Lesson 1: Knowledge management overview
- Lesson 2: Authoring and organizing
- Lesson 3: Use knowledge content
- Lesson 4: Manage knowledge content

Module 5: Omnichannel

- Lesson 1: Get Started
- Lesson 2: Entity record routing
- Lesson 3: Routing and work distribution
- Lesson 4: Configure message channels
- Lesson 5: Deploy chat widgets
- Lesson 6: Create smart assist solutions
- Lesson 7: Integrate a Power Virtual Agents bot
- Lesson 8: Productivity tools

Module 6: Customer Service Scheduling

- Lesson 1: Getting Started with Customer Service Scheduling
- Lesson 2: Configure Customer Service Scheduling
- Lesson 3: Defining and working with bookable resources
- Lesson 4: Working with services
- Lesson 5: Working with fulfillment preferences
- Lesson 6: Scheduling service activities
- Lesson 7: Rescheduling service activities and substituting resources

Module 7: Connected Customer Service

- Lesson 1: Getting started with Connected Customer Service
- Lesson 2: Registering devices
- Lesson 3: Device management and interaction
- Lesson 4: IoT alerts and sending commands

Module 8: Customer Service Insights

- Lesson 1: Get started with Customer Service Insights
- Lesson 2: Work with Customer Service call insights