Microsoft Dynamics 365 Customer Service

Course MB-230 4 Days Instructor-led, Hands on

Course Information

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.

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.

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.

At Course Completion

After completing this course, students will be able to:

- Get started with Dynamics 365 Customer Service
- Managing cases with Dynamics 365 Customer Service Hub
- Use Microsoft Dynamics 365 Customer Service queues to manage case workloads Complete a case resolution process
- Create or update records automatically in Customer Service Hub
- Get started with unified routing for Dynamics 365 Customer Service
- Create and manage entitlements in Microsoft Dynamics 365 Customer Service
- Create knowledge management solutions in Dynamics 365 Customer Service
- Use knowledge articles to resolve Dynamics 365 Customer Service cases
- Create a survey project with Dynamics 365 Customer Voice
- Create customer surveys with Dynamics 365 Customer Voice
- Send Dynamics 365 Customer Voice surveys
- Automate Dynamics 365 Customer Voice surveys with Power Automate
- Set up Customer Service scheduling

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- Schedule services with Customer Service scheduling
- Enhance agent productivity with Customer Service workspace
- Create custom experiences for agents with agent experience profiles in Customer Service
- Getting started with Omnichannel for Customer Service
- Route and distribute work with unified routing in Dynamics 365 Customer Service
- Deploy an SMS channel in Omnichannel for Dynamics 365 Customer Service
- Deploy chat widgets with Omnichannel for Dynamics 365 Customer Service
- Create smart assist solutions in Omnichannel for Dynamics 365 Customer Service
- Get started with Customer Service Insights
- Create visualizations for Dynamics 365 Customer Service
- Get started with Connected Customer Service for Dynamics 365 and Azure IoT
- Register and manage devices with Connected Customer Service for Dynamics 365 and Azure IoT
- Create custom apps for Dynamics 365 Customer Service
- Integrate a Power Virtual Agents bot with Omnichannel for Customer Service

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.

Course Outline

Module 1: Get started with Dynamics 365 Customer Service

- Introducing Dynamics 365 Customer Service
- Customer Service core components
- Understand the modern customer journey

Module 2: Managing cases with Dynamics 365 Customer Service Hub

- Case management overview
- Case creation and lifecycle
- Considerations for case creation automation
- Case management scenarios
- Case management dashboard scenarios
- Case management work with cases scenarios
- Work with status reason transitions

Module 3: Use Microsoft Dynamics 365 Customer Service queues to manage case workloads

- Introduction to Microsoft Dynamics 365 queues
- Configure tables for queues
- Create a Microsoft Dynamics 365 queue
- Work with queues
- Routing rule sets

Module 4: Create or update records automatically in Customer Service Hub

- Set up rules to create or update records automatically
- Configure rules for creating or updating records automatically
- Map records manually with Power Automate
- Complete and activate your rule
- Use the activity monitor to review and track rules

Module 5: Get started with unified routing for Dynamics 365 Customer Service

- Route cases by using basic routing rule sets
- Set up unified routing
- Create and manage users
- Create and manage queues for unified routing
- Set up workstreams for record routing

Module 6: Create and manage entitlements in Microsoft Dynamics 365 Customer Service

- Overview of entitlements
- Create entitlement records
- Work with entitlement channels
- Other considerations
- Define entitlement templates

Module 7: Create knowledge management solutions in Dynamics 365 Customer Service

- Knowledge management overview
- Create and define knowledge articles
- Knowledge article lifecycle
- Manage knowledge article versions, categories, and translations
- Knowledge article publication

Module 8: Use knowledge articles to resolve Dynamics 365 Customer Service cases

- Knowledge article and case resolution overview
- Enable and configure entities for Knowledge Search
- Configure article search and display options
- Search for knowledge articles
- Article analytics

Module 9: Create a survey project with Dynamics 365 Customer Voice

- Dynamics 365 Customer Voice
- Projects in Dynamics 365 Customer Voice
- Create your first project

Module 10: Create customer surveys with Dynamics 365 Customer Voice

- Survey headers and branding
- Add branching logic to surveys
- Personalize a survey with variables
- Add satisfaction metrics to a survey and project
- Add multiple languages for your surveys

Module 11: Send Dynamics 365 Customer Voice surveys

- Create and personalize email templates
- Translate email templates into other languages
- Email a survey
- Upload CSV files
- Use links and QR codes
- Analyze survey reports

Module 12: Automate Dynamics 365 Customer Voice surveys with Power Automate

- Send a survey with Power Automate
- Create an invitation
- Expand variables to further customize surveys
- Use the locale variable for multilingual surveys
- Use variables for follow-up actions

Module 13: Set up Customer Service scheduling

- Set up service scheduling
- Define resources

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Module 14: Schedule services with Customer Service scheduling

- Set up fulfillment preferences
- Create service activities
- Schedule service activities

Module 15: Enhance agent productivity with Customer Service workspace

- Explore the Customer Service workspace user interface
- View and edit records
- Work with case records
- Use the Productivity pane in Customer Service workspace

Module 16: Create custom experiences for agents with agent experience profiles in Customer Service

- Create and use agent experience profiles to manage apps
- Application tab templates
- Session templates
- Manage notification settings and templates
- Use templates in workstreams

Module 17: Getting started with Omnichannel for Customer Service

- Introduction to Omnichannel for Customer Service
- Use the agent interface
- Manage sessions and work with applications
- Work with conversations
- Work with customer information
- Helping an agent's productivity
- Helping an agent's productivity

Module 18: Route and distribute work with unified routing in Dynamics 365 Customer Service

- Set up work classification
- Route items to queues
- Set up work assignments in queues
- Get started with intelligent routing
- Diagnostics

Module 19: Deploy an SMS channel in Omnichannel for Dynamics 365 Customer Service

- Configure phone numbers and messaging accounts
- Configure SMS workstream
- Configure SMS workstream options
- Route SMS conversations
- Configure Additional Settings

Module 20: Deploy chat widgets with Omnichannel for Dynamics 365 Customer Service

- Introduction to chat channels
- Set up a workstream for chat
- Create a chat channel
- Allow chat transcripts and file downloads
- Work with prechat and post-chat surveys
- Embed a chat widget in a portal
- Use proactive chat

Module 21: Create smart assist solutions in Omnichannel for Dynamics 365 Customer Service

- Work with Microsoft Adaptive Cards
- Build a smart assist bot
- Integrate a smart assist bot with Omnichannel for Customer Service

Module 22: Get started with Customer Service Insights

- Introduction to Customer Service Insights
- Configure Customer Service Insights
- Use Customer Service Analytics dashboards in Power BI
- Discover Customer Service Insights dashboards
- Discover Knowledge search analytics

Module 23: Create visualizations for Dynamics 365 Customer Service

- Create and use charts
- Create dashboards for Customer Service
- Use Power BI to view Customer Service data

Module 24: Get started with Connected Customer Service for Dynamics 365 and Azure IoT

- Choose a deployment type

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- Install Connected Customer Service
- Customer assets and IoT alerts

Module 25: Register and manage devices with Connected Customer Service for Dynamics 365 and Azure IoT

- Generate alerts from IoT devices
- Device management and interaction
- Create and send commands to IoT devices

Module 26: Create custom apps for Dynamics 365 Customer Service

- Create Power Apps for Dynamics 365 Customer Service
- Deploy a self-service portal for Customer Service
- Customize case management

Module 27: Integrate a Power Virtual Agents bot with Omnichannel for Customer Service

- Create an Azure Active Directory application
- Configure the Power Virtual Agents bot
- Configure Omnichannel for Customer Service