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Learning Style: Virtual Classroom

Technology: Microsoft

Difficulty: Intermediate

Course Duration: 4 Days

Microsoft Dynamics 365 Customer Service (MB-230T01)



About this course:

MS Dynamics 365 for Customer Service provides every association with an open door for the success of the customer. Utilizing devices, for example, automatic queue management and case creation save your time to devote it where you can have a more noteworthy effect, straightforwardly with your clients.

Line up with our group of worldwide perceived specialists as they make you to stride by step from making cases to interfacing with clients to settling those cases. When you've settled those cases you can gain from information analysis the key subtleties to assist you with settling comparative cases quicker or maintain a strategic distance from new issues inside and out.

The normal pay of a Developer of Dynamics CRM is $120,000 every year.

Course Objective:

- Configure and Install the app of customer service
- Analyze customer service data
- Create case records
- Related service apps
- AI for service
- Configuring customer service
- Identify common scenarios of customer service
- Case management overview
- Creating case records
- Queue management
- Make and use information articles
- Complete a case resolution process
- Open and resolve customer service cases.
- Automate case creation and routing.
- SLA and entitlement overview
- Create and manage entitlements
- Create and manage SLAs
- Create and use service and entitlements level agreements
- Case management record processing automation.
- Knowledge management overview
- Authoring and organizing
- Create and use knowledge articles

Audience:

A Functional Consultant of Dynamics 365 Customer Engagement is liable for capturing requirements, performing discovery, translating requirements, engaging subject matter stakeholders and experts, and configuring the applications and solution. The Functional Consultant executes an answer utilizing service and application integration, out of the box capacities, and codeless extensibility.

Prerequisite:

This course is intended for people who are trying to the Admin job of MS 365 Enterprise and have finished one of the certification paths of MS 365 workload administrator.

Course Outline:

Module 1: Work with Cases

In this module you will learn about working with Cases in Dynamics 365 Customer Service.

Lessons

- Lesson 1: Get started with Cases
- Lesson 2: Managing Cases
- Lesson 3: Use queues to manage case workloads
- Lesson 4: Create or update records automatically
- Lesson 5: Unified routing

After completing this module, students will be able to:

- Create and manage Cases
- Work with queues and unified routing
- Create or update records automatically

Module 2: Work with entitlements and service level agreements

In this module you will learn how to create and manage entitlements and service level agreements

Lessons

- Lesson 1: Create and manage entitlements
- Lesson 2: Create and manage service level agreements

After completing this module, you will be able to:

- Create and manage entitlements
- Create and manage service level agreements

Module 3: Work with knowledge management

In this module you will learn how to create knowledge management solutions, and use knowledge articles to resolve cases

Lessons

- Lesson 1: Create knowledge management solutions
- Lesson 2: Use knowledge articles to resolve cases
- Lesson 3: Create and manage SLAs

After completing this module, you will be able to:

- Create and use knowledge management solutions
- Use knowledge articles to resolve cases

Module 4: Create surveys with Customer Voice

In this module you will learn how to engage with customers using Dynamics 365 Customer Voice

Lessons

- Lesson 1: Create a survey project
- Lesson 2: Create surveys
- Lesson 3: Send surveys
- Lesson 4: Automate surveys

After completing this module, you will be able to:

- Work with Dynamics 365 Customer Voice to send surveys to customers and collect feedback

Module 5: Schedule services

In this module, you will learn how to schedule services and resources using Customer Service Scheduling

Lessons

- Lesson 1: Configure Customer Service Scheduling
- Lesson 2: Schedule services

After completing this module, you will be able to:

- Schedule services and resources using Dynamics 365 Customer Service Scheduling

Module 6: Work with Dynamics 365 Customer Service workspaces

In this module, you will learn how to use Customer Service workspaces

Lessons

- Lesson 1: Enhance agent productivity
- Lesson 2: App profile manager

After completing this module, you will be able to:

- Use customer service workspaces to enhance agent productivity
- Use the app profile manager

Module 7: Omnichannel for Dynamics 365 Customer Service

In this module, you will learn how to use Omnichannel for Dynamics 365 Customer Service

Lessons

- Lesson 1: Getting started
- Lesson 2: Routing and work distribution
- Lesson 3: Deploy an SMS channel
- Lesson 4: Deploy chat widgets
- Lesson 5: Create smart assist solutions

After completing this module, you will be able to:

- Work with Omnichannel for Dynamics 365 Customer Service

Module 8: Manage analytics and insights

In this module, you will learn how to work with insights in Customer Service to use Artificial Intelligence (AI) in your Dynamics 365 Customer Service solution.

Lessons

- Lesson 1: Get started
- Lesson 2: Create visualizations

After completing this module, you will be able to:

- Work with insights in Customer Service to use Artificial Intelligence (AI) in your Dynamics 365 Customer Service solution.
- Create visualizations in Customer Service

Module 9: Connected Customer Service

In this module, you will learn how to use Connected Customer Service to proactively handle customer service scenarios

Lessons

- Lesson 1: Getting started
- Lesson 2: Registering and managing devices

After completing this module, you will be able to:

- Work with Connected Customer Service
- Register and manage devices

Module 10: Implement Microsoft Power Platform

In this module, you will learn how to work with the Microsoft Power Platform to enhance your Dynamics 365 Customer Service solution

Lessons

- Lesson 1: Create custom apps
- Lesson 2: Integrate a Power Virtual Agents bot

After completing this module, you will be able to:

- Create custom apps in Microsoft Power Platform for your Customer Service solution
- Integrate a Power Virtual Agents bot

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