Microsoft Dynamics 365 Customer Service (MB-230T01)

COURSE OVERVIEW

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.

WHO WILL BENEFIT FROM THIS COURSE?

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.

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 OBJECTIVES

Students will learn 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
- 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
- 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

COURSE OUTLINE

Module 1: Get started with Dynamics 365 Customer Service
- Learn about the pieces of Dynamics 365 Customer Service
- Learn how to optimize Dynamics 365 Customer Service to improve your customer relations

Module 2: Managing cases with Dynamics 365 Customer Service Hub
- Examine the case resolution process in Dynamics 365 from beginning to end
- Identify the different options that are available for creating and defining cases
- Use business process flows to guide agents through case resolution
- Review when and how parent/child cases are used
- Identify when similar cases should be merged
- Work with case status reason transitions, and configure custom status transitions

Module 3: Use Microsoft Dynamics 365 Customer Service queues to manage case workloads
- Identify the different types of Microsoft Dynamics 365 queues that are available
- Create a queue, and define queue members
- Assign, pick, and release queue items
- Define routing rule sets to move items to specific queues
- Set up other Dynamics 365 tables so that they can be used with queues

Module 4: Create or update records automatically in Customer Service Hub
- Learn about automatic record creation and review instances where you can use it.
- Review the process of defining rules by using the Customer Service Hub app.
- Examine rule items, how they're used within a rule, and the process for defining them within a rule.
- Learn how to use Microsoft Power Automate to create the record in the application.
- Learn how to configure the Power Automate flow to map a contact manually.
- Examine how to use the activity monitor to review the status of rules that are being processed.

Module 5: Get started with unified routing for Dynamics 365 Customer Service
- Learn about basic routing.
- Set up unified routing.

- Create and manage user setup.
- Learn about queues and workstreams.

Module 6: Create and manage entitlements in Microsoft Dynamics 365 Customer Service
- Create and define entitlement records
- Control when an entitlement is applied
- Define specific entitlement terms and supported channels
- Define entitlements that are product-specific or contact-specific
- Work with multiple entitlement records for a specific customer
- Use entitlement templates to quickly create new entitlements

Module 7: Create knowledge management solutions in Dynamics 365 Customer Service
- Identify scenarios where knowledge articles can be used
- Create and define knowledge articles in Dynamics 365
- Manage the knowledge article lifecycle
- Control article version, translation, and publishing options

Module 8: Use knowledge articles to resolve Dynamics 365 Customer Service cases
- Configure Dynamics 365 Entities for use with Knowledge Management
- Define and control Article display options on entities
- Search for and use Articles to resolve Dynamics 365 cases
- View and manage Knowledge Article Analytics

Module 9: Create a survey project with Dynamics 365 Customer Voice
- Learn about Dynamics 365 Customer Voice and how it can benefit an organization.
- Create your first project.
- Discover the high-level features and functionality of a project.

Module 10: Create customer surveys with Dynamics 365 Customer Voice
- Create your first survey with a theme and custom branding.
- Learn when to use branching rules to guide respondents through a survey.
- Personalize surveys with variables.

Module 11: Send Dynamics 365 Customer Voice surveys
- Learn how to create email templates to send from Dynamics 365 Customer Voice.
- Learn how to email surveys directly from Dynamics 365 Customer Voice.
- Discover the different methods of sending surveys, including with direct links and QR codes.
- Send survey reminders and learn how to interpret the survey distribution report.

Module 12: Automate Dynamics 365 Customer Voice surveys with Power Automate
- Learn about the role that Power Automate plays when you are setting up projects and surveys in Dynamics 365 Customer Voice.
- Discover the purpose of using variables to further customize surveys.
- Create a flow in Power Automate to create and send survey invitations to customers.

Module 13: Set up Customer Service scheduling
- Get started with Customer Service scheduling.
- Learn how to set up Customer Service scheduling.
- Discover how to define resources.

Module 14: Schedule services with Customer Service scheduling
- Learn how to define services.
- Discover how to configure fulfillment preferences.
- Learn how to create and schedule service activities.

Module 15: Enhance agent productivity with Customer Service workspace
- View and edit records.
- Work with cases.

Module 16: Create custom experiences for agents with agent experience profiles in Customer Service
- Learn about agent experience profiles, when they're available, and how to access them.
- Create custom profiles with the user interface.
- Define which channels and productivity features are available within a profile.
- Configure session templates.
- Create application tab templates.
- Create notification templates and use notification fields.
- Review associate session and notification templates with workstreams.

Module 17: Getting started with Omnichannel for Customer Service
- Learn about agent experience and managing sessions.
- Work with conversations and customer summaries.

Module 18: Route and distribute work with unified routing in Dynamics 365 Customer Service
- Set up the components that are involved in classification and assignment of work items.
- Classify work items and route work to employees.
- Set up queues to distribute work.
- Run diagnostics.

Module 19: Deploy an SMS channel in Omnichannel for Dynamics 365 Customer Service
- Configure an SMS channel.
- Configure phone numbers and messaging accounts such as TeleSign and Twilio.
- Configure SMS workstream and workstream options.
- Route SMS conversations.
- Set up additional settings.

Module 20: Deploy chat widgets with Omnichannel for Dynamics 365 Customer Service
- Create a chat channel.
- Allow chat transcripts and file downloads.
- Work with pre-chat and post-chat surveys.
- Embed a chat widget in a portal.

Module 21: Create smart assist solutions in Omnichannel for Dynamics 365 Customer Service
- Write adaptive cards that render content for a smart assist bot.
- Build a smart assist bot.
- Create a bot user.
- Add a smart assist bot to a workstream.
- Enable the Productivity pane.

Module 22: Get started with Customer Service Insights
- Learn about Customer Service Insights and what it can provide for an organization.
- Examine how to configure Customer Service Insights for your organization.
- Learn about installing Power BI app for Customer Service Insights to gain insights.
- Discover the different dashboards that are available.

Module 23: Create visualizations for Dynamics 365 Customer Service
- Review the data reporting and visualization options in Dynamics 365 Customer Service.
- Discover how to create charts.
- Learn how to use and create tier 1 and tier 2 interactive dashboards.
- Discover how to use Microsoft Power BI to view Dynamics 365 Customer Service data.

Module 24: Get started with Connected Customer Service for Dynamics 365 and Azure IoT
- Learn about the Connected Customer Service Add-in for Microsoft Dynamics 365.
- Choose a deployment type.
- Install the Connected Customer Service Add-in.
- Learn about customer assets and IoT alerts.

Module 25: Register and manage devices with Connected Customer Service for Dynamics 365 and Azure IoT
- Learn how to register IoT devices.
- Discover how to create IoT alerts and convert alerts to cases.
- Learn about the required security roles for Connected Customer Service.
- Discover how to manage interactions with IoT devices.
- Learn about sending commands to IoT devices.

Module 26: Create custom apps for Dynamics 365 Customer Service
- Learn how you can use Microsoft Power Platform to customize Dynamics 365 Customer Service.
- Learn how to create apps from Microsoft Power Apps for Customer Service.
- Learn how to deploy a self-service portal for Customer Service.
- Discover how to 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.

WHY TRAIN WITH SUNSET LEARNING INSTITUTE?

Sunset Learning Institute (SLI) has been an innovative leader in developing and delivering authorized technical training since 1996. Our goal is to help our customers optimize their technology Investments by providing convenient, high quality technical training that our customers can rely on. We empower students to master their desired technologies for their unique environments.

What sets SLI apart is not only our immense selection of trainings options, but our convenient and consistent delivery system. No matter how complex your environment is or where you are located, SLI is sure to have a training solution that you can count on!

Premiere World Class Instruction Team
- All SLI instructors have a four-year technical degree, instructor level certifications and field consulting work experience
- Sunset Learning has won numerous Instructor Excellence and Instructor Quality Distinction awards since 2012

Enhanced Learning Experience
- The goal of our instructors during class is ensure students understand the material, guide them through our labs and encourage questions and interactive discussions.

Convenient and Reliable Training Experience
- You have the option to attend classes live with the instructor, at any of our established training facilities, or from the convenience of your home or office
- All Sunset Learning Institute classes are guaranteed to run – you can count on us to deliver the training you need when you need it!

Outstanding Customer Service
- You will work with a dedicated account manager to suggest the optimal learning path for you and/or your team
- An enthusiastic student services team is available to answer any questions and ensure a quality training experience

Interested in Private Group Training?
Contact Us