

Course Outline

MB230 – Dynamics 365 for Customer Engagement for Customer Service

General Description

Microsoft Dynamics 365 for 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.

Audience Profile

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.

Outcomes

After completing this course, 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

Prerequisites

This course is designed for persons who are aspiring to the Microsoft 365 Enterprise Admin role and have completed one of the Microsoft 365 work load administrator certification paths.

Course Details

Course code: MB230
Duration: 1 day
Starting time: 9am
Finishing time: 4.30pm

Booking guidelines

Contact our learning consultants on 1300 86 87246 and we will assist you with your booking.



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 **1300 86 87246**
1300 TO TRAIN

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on 1300 86 87246 or email us on info@advancedtraining.com.au

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Course Outline

➤ **Module 1: Customer Service Overview**

In this module you will learn the basics of customer service in Dynamics 365. We will install and configure the application as well as learn about security roles, related applications and analytics.

Lessons

- Create case records
- Related service apps
- Analytics for service
- AI for service
- Configuring customer service
- Module summary

After completing this module, students will be able to:

- Install and configure the customer service application.
- Identify common customer service scenarios.

➤ **Module 2: Case Management**

In this module you will learn how to open and resolve customer service cases, both manually and with automation.

Lessons

- Case management overview
- Creating case records
- Queue management
- Case routing
- Resolving cases
- Module summary

After completing this module, you will be able to:

- Open and resolve customer service cases.
- Automate case creation and routing.

➤ **Module 3: Service Level Agreements and Entitlements**

In this module you will learn how to define and use entitlements and entitlement templates as well as service level agreements and how these tools enable case resolution.

Lessons

- SLA and entitlement overview
- Create and manage entitlements
- Create and manage SLAs
- Module summary

After completing this module, you will be able to:

- Create and use service level agreements.
- Create and use entitlements.

➤ **Module 4: Knowledge Management**

In this module you will learn how to create and use knowledge management. Additionally, you will learn the lifecycle of knowledge articles.

Lessons

- Knowledge management overview
- Authoring and organizing
- Use knowledge content
- Manage knowledge content
- Module summary

After completing this module, you will be able to:

- Create and manage knowledge content.