
Dynamics 365 for Customer Engagement for Customer Service

Duration: 4 Days **Course Code: M-MB230**

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.

Target Audience:

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
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Content:

Get started with Dynamics 365 Customer Service

- Introducing Dynamics 365 Customer Service
- Customer Service core components
- Understand the modern customer journey
- Check your knowledge
- Summary

Managing cases with Dynamics 365 Customer Service Hub

- Case management overview
- Case creation and lifecycle
- Considerations for case creation automation
- Exercise - Create and resolve cases
- Case management scenarios
- Case management dashboard scenarios
- Case management work with cases scenarios
- Work with status reason transitions
- Exercise - Manage cases in Microsoft Dynamics 365
- Check your knowledge
- Summary

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
- Exercise - Use queues to manage case workloads
- Routing rule sets
- Exercise - Use routing rules to assign cases to specific queues
- Check your knowledge
- Summary

Create or update records automatically in Customer Service Hub

- Introduction
- 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
- Check your knowledge
- Summary

Get started with unified routing for Dynamics 365 Customer Service

- Introduction
- Route cases by using basic routing rule sets
- Set up unified routing

Create customer surveys with Dynamics 365 Customer Voice

- Introduction
- 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
- Exercise - Create a basic survey
- Check your knowledge
- Summary

Send Dynamics 365 Customer Voice surveys

- Introduction
- 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
- Exercise - Create an email template
- Check your knowledge
- Summary

Automate Dynamics 365 Customer Voice surveys with Power Automate

- Introduction
- 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
- Exercise – Create a survey invitation
- Check your knowledge
- Summary

Set up Customer Service scheduling

- Introduction
- Set up service scheduling
- Define resources
- Check your knowledge
- Summary

Schedule services with Customer Service scheduling

- Introduction
- Set up fulfillment preferences
- Create service activities
- Schedule service activities
- Check your knowledge
- Summary

Enhance agent productivity with Customer Service workspace

Deploy an SMS channel in Omnichannel for Dynamics 365 Customer Service

- Introduction
- Configure phone numbers and messaging accounts
- Configure SMS workstream
- Configure SMS workstream options
- Route SMS conversations
- Configure Additional Settings
- Check your knowledge
- Summary

Deploy chat widgets with Omnichannel for Dynamics 365 Customer Service

- Introduction to chat channels
- 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
- Use proactive chat
- Check your knowledge
- Summary

Create smart assist solutions in Omnichannel for Dynamics 365 Customer Service

- Introduction
- Work with Microsoft Adaptive Cards
- Build a smart assist bot
- Integrate a smart assist bot with Omnichannel for Customer Service
- Check your knowledge
- Summary

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
- Check your knowledge
- Summary

Create visualizations for Dynamics 365 Customer Service

- Introduction
- Create and use charts
- Create dashboards for Customer Service
- Reports in Dynamics 365 Customer Service
- Use Power BI to view Customer Service data
- Check your knowledge
- Summary

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

- Create and manage users
- Create and manage queues for unified routing
- Set up workstreams for record routing
- Check your knowledge
- Summary

Create and manage entitlements in Microsoft Dynamics 365 Customer Service

- Overview of entitlements
- Create entitlement records
- Work with entitlement channels
- Other considerations
- Exercise - Manage support contracts by using entitlements
- Define entitlement templates
- Check your knowledge
- Summary

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
- Exercise - Create and maintain knowledge articles
- Check your knowledge
- Summary

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
- Exercise - Resolve Microsoft Dynamics 365 cases by using knowledge articles
- Article analytics
- Check your knowledge
- Summary

Create a survey project with Dynamics 365 Customer Voice

- Introduction
- Dynamics 365 Customer Voice
- Projects in Dynamics 365 Customer Voice
- Create your first project
- Exercise - Create a basic project
- Check your knowledge
- Summary

- Introduction
- Explore the Customer Service workspace user interface
- View and edit records
- Work with case records
- Use the Productivity pane in Customer Service workspace
- Check your knowledge
- Summary

Create custom experiences for agents with the App profile manager in Customer Service

- Introduction
- Get started with the app profile manager
- Create and use app profiles to manage apps
- Application tab templates
- Session templates
- Manage notification settings and templates
- Use templates in workstreams
- Check your knowledge
- Summary

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
- Check your knowledge
- Summary

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

- Introduction
- Set up work classification
- Route items to queues
- Set up work assignments in queues
- Get started with intelligent routing
- Diagnostics
- Check your knowledge
- Summary

- Introduction
- Choose a deployment type
- Install Connected Customer Service
- Customer assets and IoT alerts
- Check your knowledge
- Summary

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

- Introduction
- Generate alerts from IoT devices
- Device management and interaction
- Create and send commands to IoT devices
- Check your knowledge
- Summary

Create custom apps for Dynamics 365 Customer Service

- Introduction
- Create Power Apps for Dynamics 365 Customer Service
- Deploy a self-service portal for Customer Service
- Customize case management
- Check your knowledge
- Summary

Integrate a Power Virtual Agents bot with Omnichannel for Customer Service

- Introduction
- Create an Azure Active Directory application
- Configure the Power Virtual Agents bot
- Configure Omnichannel for Customer Service
- Check your knowledge
- Summary

Further Information:

For More information, or to book your course, please call us on 00 971 4 446 4987

training@globalknowledge.ae

www.globalknowledge.com/en-ae/

Global Knowledge, Dubai Knowledge Village, Block 2A, First Floor, Office F68, Dubai, UAE