

## Dynamics 365 for Customer Engagement for Customer Service

**Duration: 4 Days    Course Code: M-MB230    Delivery Method: Company Event**

### Overview:

Learn how to use Microsoft Dynamics 365 to impact your customers.

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.

#### Company Events

These events can be delivered exclusively for your company at our locations or yours, specifically for your delegates and your needs. The Company Events can be tailored or standard course deliveries.

### 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.

### 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
- Get 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 Microsoft Copilot Studio copilot with Omnichannel for

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### 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.

### Testing and Certification

Exam MB-230: Microsoft Dynamics 365 Customer Service Functional Consultant

## Content:

### 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 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

### 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

- The Connected Customer Service Add-in for Microsoft Dynamics 365.

#### 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.

#### 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 : Get started with Omnichannel for Customer Service

- Agent experience and managing sessions.
- 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.

- How to choose a deployment type.
- How to install the Connected Customer Service Add-in.
- Customer assets and IoT alerts.

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

- Register IoT devices.
- Create IoT alerts and convert alerts to cases.
- Understand the required security roles for Connected Customer Service.
- Manage interactions with IoT devices.
- Send 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 Microsoft Copilot Studio copilot with Omnichannel for Customer Service

- Create a Microsoft Entra ID application.
- Configure the Microsoft Copilot Studio copilot.
- Configure Omnichannel for Customer Service.

### Further Information:

For More information, or to book your course, please call us on 00 20 (0) 2 2269 1982 or 16142

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