
Dynamics 365 for Customer Engagement for Customer Service

Duration: 1 Day Course Code: M-MB230 Delivery Method: Company Event

Overview:

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.

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:

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| ■ After completing this course, you will be able to: | ■ Analyze customer service data |
| ■ Install and configure the customer service app | ■ Automate case management record processing |
| ■ Identify common customer service scenarios | ■ Create and use knowledge articles |
| ■ Complete a case resolution process | ■ Create and use entitlements and service level agreements |
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Prerequisites:

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Content:

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

- Lesson 1: Create case records
- Lesson 2: Related service apps
- Lesson 3: Analytics for service
- Lesson 4: AI for service
- Lesson 5: Configuring customer service
- Lesson 6: Module summary
- Lesson 1: Case management overview
- Lesson 2: Creating case records
- Lesson 3: Queue management
- Lesson 4: Case routing
- Lesson 5: Resolving cases
- Lesson 6: Module summary
- Lesson 1: SLA and entitlement overview
- Lesson 2: Create and manage entitlements
- Lesson 3: Create and manage SLAs
- Lesson 4: Module summary
- Lesson 1: Knowledge management overview
- Lesson 2: Authoring and organizing
- Lesson 3: Use knowledge content
- Lesson 4: Manage knowledge content
- Lesson 5: 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

- Lesson 1: Create case records
- Lesson 2: Related service apps
- Lesson 3: Analytics for service
- Lesson 4: AI for service
- Lesson 5: Configuring customer service
- Lesson 6: Module summary
- Lesson 1: Case management overview
- Lesson 2: Creating case records
- Lesson 3: Queue management
- Lesson 4: Case routing
- Lesson 5: Resolving cases
- Lesson 6: Module summary
- Lesson 1: SLA and entitlement overview
- Lesson 2: Create and manage entitlements
- Lesson 3: Create and manage SLAs
- Lesson 4: Module summary
- Lesson 1: Knowledge management overview
- Lesson 2: Authoring and organizing
- Lesson 3: Use knowledge content
- Lesson 4: Manage knowledge content
- Lesson 5: Module summary

After completing this module, you will be able to:

- Open and resolve customer service cases.
- Automate case creation and routing.
- Create and use service level agreements.
- Create and use entitlements.
- Create and manage knowledge content.

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

- Lesson 1: Create case records
- Lesson 2: Related service apps
- Lesson 3: Analytics for service
- Lesson 4: AI for service
- Lesson 5: Configuring customer service
- Lesson 6: Module summary
- Lesson 1: Case management overview
- Lesson 2: Creating case records
- Lesson 3: Queue management
- Lesson 4: Case routing
- Lesson 5: Resolving cases
- Lesson 6: Module summary
- Lesson 1: SLA and entitlement overview
- Lesson 2: Create and manage 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

- Lesson 1: Create case records
- Lesson 2: Related service apps
- Lesson 3: Analytics for service
- Lesson 4: AI for service
- Lesson 5: Configuring customer service
- Lesson 6: Module summary
- Lesson 1: Case management overview
- Lesson 2: Creating case records
- Lesson 3: Queue management
- Lesson 4: Case routing
- Lesson 5: Resolving cases
- Lesson 6: Module summary
- Lesson 1: SLA and entitlement overview
- Lesson 2: Create and manage entitlements
- Lesson 3: Create and manage SLAs
- Lesson 4: Module summary
- Lesson 1: Knowledge management overview
- Lesson 2: Authoring and organizing
- Lesson 3: Use knowledge content
- Lesson 4: Manage knowledge content
- Lesson 5: Module summary

After completing this module, you will be able to:

- Open and resolve customer service cases.
- Automate case creation and routing.
- Create and use service level agreements.
- Create and use entitlements.
- Create and manage knowledge content.

- Lesson 3: Create and manage SLAs
- Lesson 4: Module summary
- Lesson 1: Knowledge management overview
- Lesson 2: Authoring and organizing
- Lesson 3: Use knowledge content
- Lesson 4: Manage knowledge content
- Lesson 5: Module summary

After completing this module, you will be able to:

- Open and resolve customer service cases.
- Automate case creation and routing.
- Create and use service level agreements.
- Create and use entitlements.
- Create and manage knowledge content.

Further Information:

For More information, or to book your course, please call us on 353-1-814 8200

info@globalknowledge.ie

www.globalknowledge.com/en-ie/

Global Knowledge, 3rd Floor Jervis House, Millennium Walkway, Dublin 1