Implement customer service solutions using Microsoft Dynamics 365 Customer Service (MB-230T01)

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

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.

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,
- Work with cases in Dynamics 365 Customer Service
- Work with entitlements and service level agreements in Dynamics 365 Customer Service
- Work with Knowledge Management Solutions in Dynamics 365 Customer Service
- Help agents be more productive in Dynamics 365 Customer Service
- Route and distribute work in Dynamics 365 Customer Service
- Connect and engage with customers with Omnichannel for Dynamics 365 Customer Service
- Create surveys with Dynamics 365 Customer Voice
- Get started with Dynamics 365 Customer Service scheduling
- Work with Customer Service Insights
- Use Connected Customer Service with Dynamics 365

Prerequisites:

- No Prerequisites

Testing and Certification

Microsoft Certified: Dynamics 365 Customer Service Functional Consultant Associate

Follow-on-Courses:

N/A

Content:

Module 1: Work with cases in Dynamics 365 Customer Service

- Get started with Dynamics 365 Customer Service
- Managing cases with Dynamics 365 Customer Service Hub
- Manage cases with Dynamics 365 Customer Service workspace
- Use Microsoft Dynamics 365 Customer Service queues to manage case workloads
- Service representative collaboration in Dynamics 365 Customer Service
- Create or update records automatically in Customer Service Hub

Module 2: Work with entitlements and service level agreements in Dynamics 365 Customer Service

- Work with service-level agreements in Dynamics 365 Customer Service
- Create and manage entitlements in Microsoft Dynamics 365 Customer Service

Module 3: Work with Knowledge Management Solutions in Dynamics 365 Customer Service

- Create knowledge management solutions in Dynamics 365 Customer Service
- Search and filter knowledge articles by using Dynamics 365 Customer Service
- Use knowledge articles to resolve Dynamics 365 Customer Service cases

Module 4: Help service reps be more productive in Dynamics 365 Customer Service

- Create custom experiences for service representatives with agent experience profiles in Customer Service
- Enhance agent productivity with Customer Service workspace
- Manage cases with Dynamics 365 Customer Service workspace
- Enhance service representative productivity and personalization in Omnichannel for Customer Service
- Enhance service representative productivity and personalization in Customer Service Hub
- Get started with Dynamics 365 Productivity Tools
- Create smart assist solutions in Omnichannel for Dynamics 365 Customer Service

Module 5: Route and distribute work in Dynamics 365 Customer Service

- Get started with unified routing for Dynamics 365 Customer Service
- Route and distribute work with unified routing in Dynamics 365 Customer Service
- Use skill-based routing in Dynamics 365 Customer Service
- Entity record routing with Omnichannel for Dynamics 365 Customer Service

Module 6: Connect and engage with customers with Omnichannel for Dynamics 365 Customer Service

- Get started with Omnichannel for Customer Service
- Deploy chat widgets with Omnichannel for Dynamics 365 Customer Service
- Deploy a Voice channel in Dynamics 365 Customer Service
- Deploy an SMS channel in Omnichannel for Dynamics 365 Customer Service
- Deploy social messaging channels in Omnichannel for Dynamics 365 Customer Service
- Deploy social messaging channels in Omnichannel for Dynamics 365 Customer Service
- Integrate a Microsoft Copilot Studio copilot with Omnichannel for Customer Service

Module 7: Create surveys with Dynamics 365 Customer Voice

- 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
- Embed surveys in your website with Dynamics 365 Customer Voice
- Create customer Power BI reports in Dynamics 365 Customer Voice

Module 8: Get started with Dynamics 365 Customer Service scheduling

- Set up Customer Service scheduling
- Schedule services with Customer Service scheduling

Module 9: Work with Customer Service Insights

- Get started with Customer Service Insights
- Create visualizations for Dynamics 365 Customer Service

Further Information:

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

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