Microsoft Dynamics 365 Customer Service – Flexible Training («MB230V»)

In this course you will learn to use tools such as automatic case creation and queue management so that you can spend your time where you can make a greater impact, namely directly with your customers.

Duration: 3 days
Price: 2'550.–
Vendor code: MB-230

Content

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 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 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 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 5: Omnichannel

In this module, you will learn how to work with Omnichannel for Dynamics 365 Customer Service.

Lessons

- Get Started
- Entity record routing
- Routing and work distribution
- Configure message channels
- Deploy chat widgets
- Create smart assist solutions
- Integrate a Power Virtual Agents bot
- Productivity tools

Module 6: Customer Service Scheduling

In this module, you will learn how to use the Customer Service Scheduling feature in Dynamics 365 Customer Service.

Lessons

- Getting Started with Customer Service Scheduling
- Configure Customer Service Scheduling
- Defining and working with bookable resources
- Working with services
- Working with fulfillment preferences
- Scheduling service activities
- Rescheduling service activities and substituting resources

Module 7: Connected Customer Service

In this module, you will learn how to use Dynamics 365 Connected Customer Service to take data and help execute actual business actions on the data.

Lessons

- Getting started with Connected Customer Service
- Registering devices
- Device management and interaction
- IoT alerts and sending commands

Module 8: Customer Service Insights

In this module, you will learn how to work with Customer Service Insights to use Artificial Intelligence (AI) in your Dynamics 365 Customer Service solution.

Lessons

- Get started with Customer Service Insights
- Work with Customer Service call insights

Key Learnings

- 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
- Work with Omnichannel
- Work with Connected Customer Service
- Work with Customer Service Scheduling
- Work with Customer Service Insights

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.

Requirements

- Microsoft Dynamics 365 Fundamentals (CRM) – Intensive Training («MB910»)

Any questions?

We are happy to advise you on +41 44 447 21 21 or info@digicomp.ch. You can find detailed information about dates on www.digicomp.ch/courses-microsoft-technology/microsoft-business-applications-dynamics-365/microsoft-dynamics-365-customer-engagement/course-microsoft-dynamics-365-customer-service-flexible-training-mb-230