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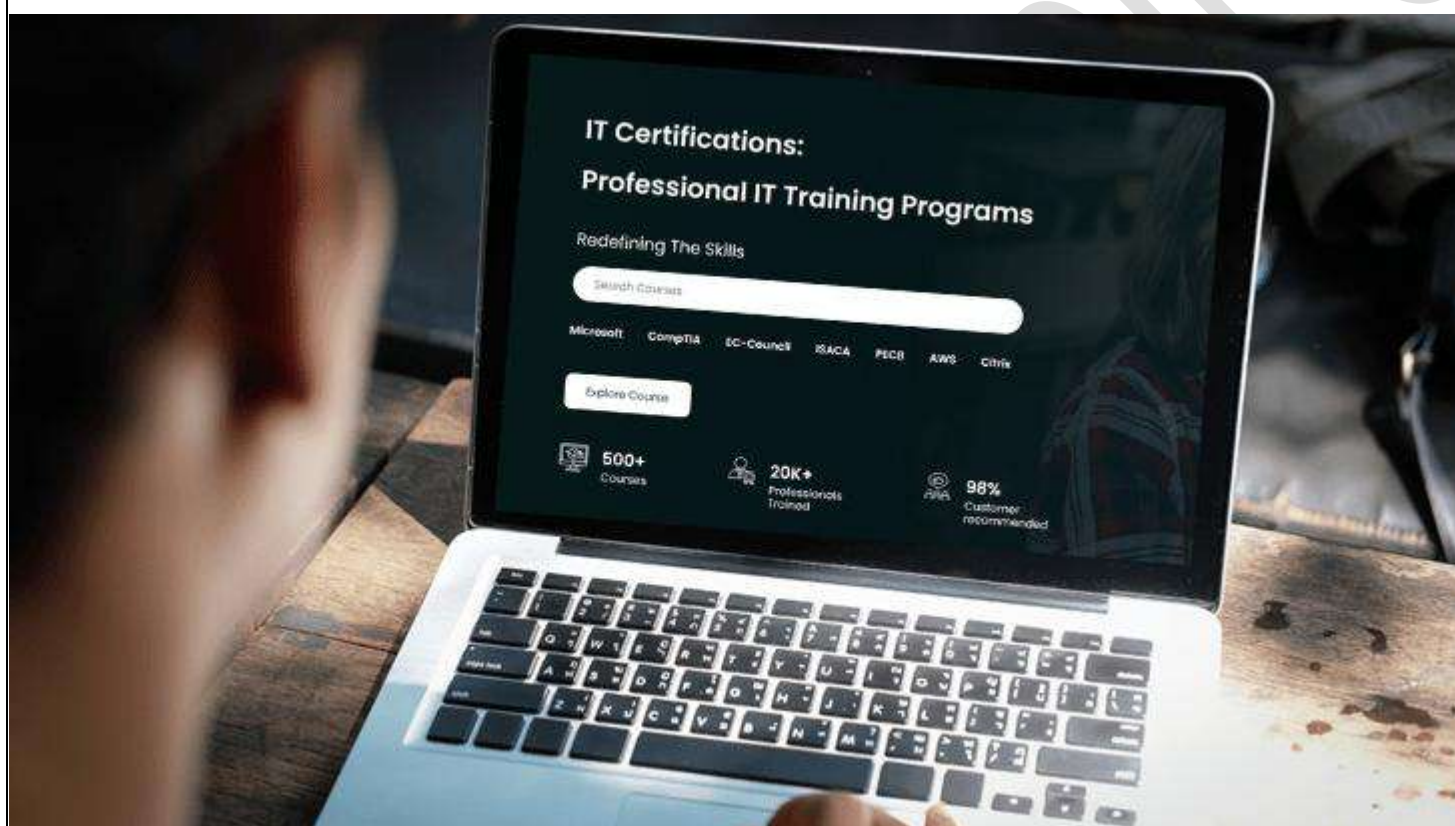
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MB-230T01: MICROSOFT DYNAMICS 365 CUSTOMER SERVICE TRAINING

Duration: 4 Days

Course Description

MB 230T01: Microsoft Dynamics 365 Customer Service Training is developed in the favour of companies and organizations in order to achieve success for their consumers. This course teaches how to set up and configure the 365 Customer Service Application while recognizing general consumer service situations.

This technical training helps in gaining a core understanding of multiple tools, such as queue management and automatic case creation. It also guides through the building and utilizing knowledge articles and finishing a case resolution process.

Being part of this comprehensive training prepares an individual for Exam MB-230: Dynamics 365 for Customer Service.

This training is designed based on the objectives of the course variant MB-230T01-A.

Who should attend this course?

- Any professional who is aspiring to become a Dynamics 365 Customer Engagement Functional Consultant.
- Given a functional consultant is responsible for configuring applications and solutions while determining and translating requirements.
- They are also responsible for discovering and engaging stakeholders and subject matter experts.
- Given below are professionals who can use Microsoft Dynamics 365 Customer Service Training to upskill their current positions:
    o IT Professionals
    o Technical support personals
    o Customer Service Representatives (CSRs)
    o Business Analysts
    o Customer Service Managers
    o Service Strategy Analysts
    o Marketing Professionals

What you will learn

- 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
- Working with the cases of Dynamics 365 Customer Service
- Use of connected customer service with Dynamics 365
- Working with a Knowledge management solution in Dynamics 365

Prerequisites

- This course is designed for functional consultants working with dynamics 365 Customer Service, or functional consultants who work with other Dynamics 365 apps.
- As a learner this course will help professionals to enhance their knowledge of customer service.

Curriculum

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 agents 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

Module 10: Use Connected Customer Service with Dynamics 365

- 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

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