

MB-230T01: Microsoft Dynamics 365 Customer Service

Duration: 1 Day

Course Content:

MB-230T01: Dynamics 365 for Customer Engagement for Customer Service Training is developed to help companies and organizations achieve customer success. It teaches how to set up and configure the customer service application and recognize general customer service situations. This technical course also helps in gaining a better understanding of various tools, such as queue management and automatic case creation. It guides through the building and utilizing knowledge articles and finishing a case resolution process. This training program is very comprehensive, which makes it ideal for individuals who are preparing for Exam MB-230: Dynamics 365 for Customer Service. By the end of this technical course, professionals will be able to automate case management record processing, assess customer service insights, and build and utilize service-level agreements.

This training helps you prepare for the "Exam MB-230: Microsoft Dynamics 365 Customer Service".

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

Who should attend?

This training is aimed at professionals who want to become Dynamics 365 Customer Engagement Functional Consultants. A functional consultant is responsible for configuring applications and solutions, determining, and translating requirements, discovering, engaging stakeholders and subject matter experts. They are also responsible for implementing a suitable solution using service and application integrations, codeless extensibility, and unique capabilities.

Course Objectives

- 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



This training helps you prepare for the

Exam MB-230: Microsoft Dynamics 365 Customer Service

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.

Detailed 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

- 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

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: Case management overview
- Lesson 2: Creating case records
- Lesson 3: Queue management
- Lesson 4: Case routing
- Lesson 5: Resolving cases

After completing this module, you will be able to:

- Open and resolve customer service cases.
- Automate case creation and routing.



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: SLA and entitlement overview
- Lesson 2: Create and manage entitlements
- Lesson 3: Create and manage SLAs

After completing this module, you will be able to:

- Create and use service level agreements.
- Create and use 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: Knowledge management overview
- Lesson 2: Authoring and organizing
- Lesson 3: Use knowledge content
- Lesson 4: Manage knowledge content

After completing this module, you will be able to:

- Create and manage knowledge content.

Module 5: Omnichannel

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

Lessons

- Lesson 1: Get Started
- Lesson 2: Entity record routing
- Lesson 3: Routing and work distribution
- Lesson 4: Configure message channels
- Lesson 5: Deploy chat widgets
- Lesson 6: Create smart assist solutions
- Lesson 7: Integrate a Power Virtual Agents bot
- Lesson 8: 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

- Lesson 1: Getting Started with Customer Service Scheduling
- Lesson 2: Configure Customer Service Scheduling
- Lesson 3: Defining and working with bookable resources
- Lesson 4: Working with services
- Lesson 5: Working with fulfillment preferences
- Lesson 6: Scheduling service activities
- Lesson 7: 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

- Lesson 1: Getting started with Connected Customer Service
- Lesson 2: Registering devices
- Lesson 3: Device management and interaction
- Lesson 4: 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

- Lesson 1: Get started with Customer Service Insights
- Lesson 2: Work with Customer Service call insights

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