

MB-230T01 Dynamics 365 for Customer Engagement for Customer Service

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 time to dedicate where a greater impact can be made, directly with customers. Our team of globally recognized experts take students step by step, from creating cases, to interacting with customers, to resolving those cases. Once those cases are resolved, students will learn from data analysis the key details to help 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.

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

Course Outline

1 - Customer Service Overview

- 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

2 - Case Management

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

3 - Service Level Agreements and Entitlements

Lesson 1: SLA and entitlement overview
Lesson 2: Create and manage entitlements
Lesson 3: Create and manage S

4 - Knowledge Management

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