

MB-230: Microsoft Dynamics 365 Customer Service Functional

Consultant

TABLE OF CONTENT

Module 1: Cases Management

Customer service overview: Get started with Dynamics 365 Customer Service

Managing cases: Managing cases with Dynamics 365 Customer Service

Queues: Use Microsoft Dynamics 365 Customer Service queues to manage case workloads

Record creation rules: Create or update records automatically in Customer Service Hub

Unified Routing: Unified Routing in Dynamics 365 Customer Service

Lab 1.1: Validate lab environment

Lab 1.2: Creating Cases

Lab 1.3: Resolving Cases

Lab 1.4: Route Cases

Module 2: Entitlements and Service Levels

Entitlements: Create and manage entitlements in Microsoft Dynamics 365 Customer Service

SLAs: Manage Service Level Agreements with Dynamics 365 Customer Service

Lab 2.1: Entitlement and Templates

Module 3: Knowledge Management

Create knowledge management solutions in Dynamics 365 Customer Service

Use knowledge articles to resolve Dynamics 365 Customer Service cases

Lab 3.1: Create Knowledge Articles

Module 4: Customer Service workspaces: Work with Dynamics 365 Customer Service workspaces

Enhance agent productivity with Customer Service workspace

Create custom experiences for agents with the App profile manager in Customer Service

Lab 4.1: Customer Service Workspace

Lab 4.2: Agent Experience Profile

Module 5: Unified Routing

Examine routing options available

Basic Routing

Getting Started with Unified Routing

Module 6: Omnichannel for Dynamics 365 Customer Service

Get started with Omnichannel for Customer Service

Routing and Distribution

Channel Configuration

Module 7: Customer Voice - Create surveys with Dynamics 365 Customer Voice

Create a survey project with Dynamics 365 Customer Voice

Create surveys with Dynamics 365 Customer Voice

Send Dynamics 365 Customer Voice surveys

Automate Dynamics 365 Customer Voice surveys with Power Automate

Lab 7.1: Create Survey

Module 8: Service scheduling: Schedule services in Dynamics 365 Customer Service

Configuring Customer Service scheduling

Schedule services with Customer Service scheduling

Lab 8.1: Configure Customer Service Schedule

Lab 8.2: Define Services

Module 9: Analytics and Insights

Get started with Customer Service Insights

Create visualizations for Customer Service

Omnichannel Insights

Module 10: Connected Customer Service

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

Module 11: Power Platform for Customer Service

Create custom apps for Dynamics 365 Customer Service

Integrate a Power Virtual Agents bot with Omnichannel for Customer Service