KOENIG
step forward

Microsoft
Solutions Partner

Microsoft Cloud
Training Services

MB-230T01: Microsoft Dynamics 365 Customer Service

Course Duration: 32 Hours (4 Days)

Overview

The MB-230T01: Microsoft Dynamics 365 Customer Service course is an in-depth training course designed to provide learners with the knowledge and skills necessary to effectively use and customize the Dynamics 365 Customer Service application. This course covers a wide range of topics, including an overview of customer service, Case management, Service level management, knowledge management, Omnichannel engagement, Unified routing, customer service scheduling, connected customer service, customer service insights, and the use of Power Platform to extend customer service capabilities .Learners will gain expertise in Managing cases, working with Entitlements and service level agreements (SLAs), and utilizing knowledge management to provide efficient customer support. The course also introduces Omnichannel for Dynamics 365 Customer Service, enhancing customer engagement across different channels. Additionally, students will learn how to schedule services, use Customer Voice to create surveys, and derive Analytics and insights from customer interaction data. By the end of the course, participants will have a comprehensive understanding of how to optimize the customer service module within Dynamics 365 to improve customer satisfaction and service efficiency. This knowledge will help them in configuring customer service solutions, analyzing service-related data, and ultimately delivering exceptional customer experiences.

Audience Profile

The MB-230T01 course empowers professionals to optimize customer service capabilities using Dynamics 365, ideal for those in service-focused roles.

- Customer Service Managers
- Dynamics 365 Administrators
- Customer Service Representatives (CSRs)
- IT Professionals responsible for customer service solutions
- Customer Experience Managers
- Business Analysts
- CRM System Implementers
- Technical Support Personnel
- Service Desk Professionals
- Operations Managers overseeing service functions
- Sales Professionals seeking to understand service capabilities
- Marketing Professionals aiming for integrated customer insights
- Customer Success Specialists
- Service Strategy Analysts

- Dynamics 365 Consultants and Trainers
- Help Desk Technicians
- Anyone involved in configuring, managing, or improving a customer service system

Course Syllabus

Learning Path 1: Case Management

- **Module 1:** Get started with Dynamics 365 Customer Service
- **Module 2:** Managing cases with Dynamics 365 Customer Service
- **Module 3:** Use Microsoft Dynamics 365 Customer Service Queues to Manage Case Workloads
- **Module 4:** Create or Update Records Automatically in Customer Service Hub
- **Lab:** Validate lab environment
- **Demo**: Set up Customer Service environment
- **Lab:** Creating cases
- **Lab:** Creating queues
- **Lab:** Resolving cases
- **Lab:** Routing cases Learning

Learning Path 2: Entitlements and Service Level Agreements

- **Module 1**: Create and Manage Entitlements in Microsoft Dynamics 365 Customer Service
- **Module 2**: Manage Service Level Agreements
- **Lab**: Entitlements and templates

Learning Path 3: Knowledge Management

- **Module 1:** Create Knowledge Management Solutions in Dynamics 365 Customer Service
- **Module 2:** Use Knowledge Articles to Resolve Dynamics 365 Customer Service Cases
- **Lab:** Create knowledge articles

Learning Path 4: Multi-session Experiences

- **Module 1:** Enhance agent productivity with Customer Service workspace
- **Module 2:** Create custom experiences with agent experience profiles
- **Lab:** Customer Service workspace
- **Lab:** Agent experience profiles

Learning Path 5: Routing

- **Module 1:** Examine routing options available
- **Module 2:** Basic record routing

- **Module 3:** Get started with Unified Routing

Learning Path 6: Omnichannel for Dynamics 365 Customer Service

- **Module 1**: Getting Started with Omnichannel for Customer Service
- **Module 2:** Configure channels in Omnichannel for Customer Service
- **Module 3**: Deploy chat widgets with Omnichannel for Customer Service

Learning Path 7: Customer Voice

- **Module 1**: Create a survey project with Dynamics 365 Customer Voice
- **Module 2**: Create surveys with Dynamics 365 Customer Voice
- **Module 3**: Send Dynamics 365 Customer Voice surveys
- **Module 4**: Automate Dynamics 365 Customer Voice surveys with Power Automate
- **Lab**: Create survey

Learning Path 8: Service Scheduling

- **Module 1:** Configure Customer Service Scheduling
- **Module 2:** Schedule Services with Customer Service Scheduling
- **Lab:** Configure Customer Service Scheduling
- **Lab:** Define Services Learning

Learning Path 9: Analytics and Insights

- **Module 1**: Get Started with Customer Service Insights
- **Module 2**: Create Visualizations for Customer Service
- **Module 3**: Omnichannel Insights
- **Demo**: Configure insights in Customer Service

Learning Path 10: Connected Customer Service

- **Module 1:** Get started with Connected Customer Service for Dynamics 365 and Azure IoT
- **Module 2:** Register and manage devices with Connected Customer Service for Dynamics 365 and Azure IoT

Learning Path 11: Power Platform for Customer Service

- **Module 1:** Create Custom Apps for Dynamics 365 Customer Service
- **Module 2**: Integrate a Power Virtual Agents bot with Omnichannel for Customer Service