

MB-230- Microsoft Dynamics 365 Customer Service

Course Description:

The MB-230: Microsoft Dynamics 365 Customer Service course is designed to equip professionals with the knowledge and skills required to implement and manage customer service solutions within the Dynamics 365 ecosystem. This comprehensive training program takes you through essential concepts such as case management, service level agreements, entitlements, knowledge management, omnichannel service, and customer insights. Participants will learn how to leverage the full power of Dynamics 365 Customer Service to enhance customer satisfaction, streamline operations, and drive business success.

Guided by industry experts, the course covers everything from the basics of Dynamics 365 Customer Service to advanced configurations, including omnichannel communication, routing, and service scheduling. By the end of the course, you will be fully prepared to take on the role of a Dynamics 365 Customer Service Functional Consultant, capable of implementing efficient and effective customer service solutions.

Audience Profile:

This course is ideal for Dynamics 365 Customer Engagement Functional Consultants who are responsible for performing discovery, capturing requirements, engaging subject matter experts and stakeholders, translating requirements, and configuring Dynamics 365 Customer Service solutions. The ideal candidates are professionals looking to enhance their skills in implementing out-of-the-box capabilities, codeless extensibility, and integrating applications and services within the Dynamics 365 Customer Service environment.

Prerequisites:

- Basic understanding of Microsoft Dynamics 365 Customer Engagement applications.
 - Familiarity with general customer service concepts and practices.
 - Experience in working with business process flows and data models within Dynamics 365.
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Course Objectives:

By the end of this course, participants will be able to:

1. Understand and navigate the Dynamics 365 Customer Service environment.
2. Implement case management features, including automatic case creation and queue management.
3. Configure and manage entitlements and service level agreements.

4. Develop and manage knowledge management solutions to improve case resolution.
 5. Enhance agent productivity using multi-session experiences and custom agent profiles.
 6. Implement routing options, including basic record routing and unified routing.
 7. Configure and deploy omnichannel features, including chat widgets and channel configurations.
 8. Use Dynamics 365 Customer Voice to create and automate surveys.
 9. Implement service scheduling features to efficiently manage customer service activities.
 10. Utilize analytics and insights to drive data-driven decisions within customer service operations.
 11. Integrate Dynamics 365 Customer Service with Azure IoT for connected customer service scenarios.
 12. Create custom apps and integrate Power Virtual Agents with omnichannel for customer service.
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Module-wise Table of Contents (TOC):

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 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 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