

KOENIG SOLUTIONS • COURSE OUTLINE

MB-230T01: Microsoft Dynamics 365 Customer Service

Learn to configure and manage Dynamics 365 Customer Service, from case management and SLAs to Omnichannel, routing and analytics.

4 Days

32 HOURS

22

MODULES

14

HANDS-ON ACTIVITIES

COURSE 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.

Who Should Attend

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

22 Modules

01

Get Started with Dynamics 365 Customer Service

02

Managing Cases with Dynamics 365 Customer Service

03

Use Microsoft Dynamics 365 Customer Service Queues to Manage Case Workloads

Create or Update Records Automatically in Customer Service Hub

Lab

Demo

Lab

Lab

Lab

Lab

01

Create and Manage Entitlements in Microsoft Dynamics 365 Customer Service

Manage Service Level Agreements

Lab

01

Create Knowledge Management Solutions in Dynamics 365 Customer Service

Use Knowledge Articles to Resolve Dynamics 365 Customer Service Cases

Lab

01

Enhance Agent Productivity with Customer Service Workspace

Create Custom Experiences with Agent Experience Profiles

Lab

Lab

01

Examine Routing Options Available

02

Basic Record Routing

03

Get Started with Unified Routing

01

Getting Started with Omnichannel for Customer Service

02

Configure Channels in Omnichannel for Customer Service

03

Deploy Chat Widgets with Omnichannel for Customer Service

01

Create a Survey Project with Dynamics 365 Customer Voice

02

Create Surveys with Dynamics 365 Customer Voice

03

Send Dynamics 365 Customer Voice Surveys

Automate Dynamics 365 Customer Voice Surveys with Power Automate

Lab

01

Configure Customer Service Scheduling

Schedule Services with Customer Service Scheduling

Lab

Lab

01

Get Started with Customer Service Insights

02

Create Visualizations for Customer Service

01

Get Started with Connected Customer Service for Dynamics 365 and Azure IoT

02

Register and Manage Devices with Connected Customer Service for Dynamics 365 and Azure IoT

01

Create Custom Apps for Dynamics 365 Customer Service

02

Integrate a Power Virtual Agents Bot with Omnichannel for Customer Service

HANDS-ON ACTIVITIES

Practise What You Learn

#	MODULE	ACTIVITY
04	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
02	Manage Service Level Agreements	Lab: Routing cases
		Lab: Entitlements and templates
02	Use Knowledge Articles to Resolve Dynamics 365 Customer Service Cases	Lab: Create knowledge articles

#	MODULE	ACTIVITY
02	Create Custom Experiences with Agent Experience Profiles	Lab: Customer Service workspace Lab: Agent experience profiles
04	Automate Dynamics 365 Customer Voice Surveys with Power Automate	Lab: Create survey
02	Schedule Services with Customer Service Scheduling	Lab: Configure Customer Service Scheduling Lab: Define Services
03	Omnichannel Insights	Demo: Configure insights in Customer Service

WHAT IS INCLUDED

Everything You Need to Succeed

- Koenig course material for every module
- Delivery by certified instructors and subject matter experts
- Hands-on exercises throughout the course
- Course completion certificate from Koenig

ABOUT KOENIG

Who We Are

Established in 1993, Koenig Solutions is a globally recognised training provider with 35+ technology partnerships, 5,000+ training programmes and a network of certified instructors and subject matter experts, supporting individuals and enterprise teams worldwide.

FLEXIBLE DELIVERY

Learn the Way That Suits You

Classroom Training

Live Online Classes (ILO)

Fly-Me-A-Trainer (FMAT)

Flexi (Self-Paced)

1-on-1 Training

Ready to Get Started?

Talk to a learning advisor about schedules, group training and customised delivery.

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