

KOENIG SOLUTIONS • COURSE OUTLINE

Microsoft Dynamics 365 CE (Omnichannel)

Learn to manage cases, knowledge and productivity tools, then deploy Omnichannel routing, chat, voice and messaging channels in Dynamics 365 Customer Service.

2 Days

DURATION

7

MODULES

25

TOPICS

COURSE OVERVIEW

This course covers case management, queues and record creation rules in Dynamics 365 Customer Service, followed by knowledge management and multi-session agent experiences using the Customer Service workspace and App profile manager. It then addresses routing options, including basic routing and unified routing, and tools that improve agent productivity, such as productivity tools and smart assist solutions. The course also covers building, sending and automating surveys with Dynamics 365 Customer Voice, before concluding with Omnichannel for Customer Service, covering chat widgets, voice, SMS, social messaging channels, Copilot Studio integration, and Apple Business Messages and Google Business Messages setup.

WHO THIS COURSE IS FOR

Customer Service Agents

Customer Service Managers

Dynamics 365 Administrators

Solution Architects

Support Engineers

LEARNING OBJECTIVES

- Manage cases and queues in Dynamics 365 Customer Service
- Configure record creation rules in Customer Service Hub
- Create knowledge articles to resolve customer service cases
- Build multi-session agent experiences with the App profile manager
- Compare basic routing and unified routing options
- Apply productivity tools and smart assist solutions for agents
- Create and automate surveys with Dynamics 365 Customer Voice
- Deploy Omnichannel chat, voice, SMS and social messaging channels

7 Modules, 25 Topics

01

Case Management

TOPICS

- **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

02

Knowledge Management

TOPICS

- Create knowledge management solutions in Dynamics 365 Customer Service
- Use knowledge articles to resolve Dynamics 365 Customer Service cases

03

Create Multi-session Experiences

TOPICS

- Enhance agent productivity with Customer Service workspace
- Create custom experiences for agents with the App profile manager in Customer Service

04

Routing

TOPICS

Examine routing options available · Basic routing · Getting Started with Unified Routing

05

Help Agents Be More Productive in Dynamics 365 Customer Service

TOPICS

- Get started with Dynamics 365 Productivity Tools
- Enhance agent productivity and personalization in Omnichannel for Customer Service
- Create smart assist solutions in Omnichannel for Dynamics 365 Customer Service

06

Customer Voice

TOPICS

- 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

07

Omnichannel for Customer Service

TOPICS

- Getting started with Omnichannel for Customer Service
- Deploy chat widgets with Omnichannel for Dynamics 365 Customer Service
- Deploy a Voice channel in Dynamics 365 Customer Service
- Deploy an SMS channel in Omnichannel for Dynamics 365 Customer Service
- Deploy social messaging channels in Omnichannel for Dynamics 365 Customer Service
- Integrate a Microsoft Copilot Studio copilot with Omnichannel for Customer Service
- Set up Apple Message for Business and Google Business Messages as channels in Dynamics 365 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.

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Live Online Classes (ILO)

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