

MB-230T01-A: Dynamics 365 for customer engagement for customer service

OBJECTIVE

Microsoft Dynamics 365 for Customer Service offers any organization an opportunity for customer success. Using tools such as automatic case creation and queue management frees up time to dedicate where a greater impact can be made, directly with customers.

Our team of globally recognized experts take students step by step, from creating cases, to interacting with customers, to resolving those cases. Once those cases are resolved, students will learn from data analysis the key details to help resolve similar cases faster or avoid new issues altogether.

COURSE TOPICS

Module 1: Customer Service Overview

In this module students will learn the basics of customer service in Dynamics 365. Students will install and configure the application, as well as learn about security roles, related applications, and analytics.

Lessons

- Lesson 1: Create case records
- Lesson 2: Related service apps
- Lesson 3: Analytics for service
- Lesson 4: AI for service
- Lesson 5: Configuring customer service
- Lesson 6: Module summary

After completing this module, students will be able to:

- Install and configure the customer service application
- Identify common customer service scenarios

Module 2: Case Management

In this module students will learn how to open and resolve customer service cases, both manually and with automation.

Lessons

- Lesson 1: Case management overview
- Lesson 2: Creating case records
- Lesson 3: Queue management
- Lesson 4: Case routing
- Lesson 5: Resolving cases
- Lesson 6: Module summary

After completing this module, students will be able to:

- Open and resolve customer service cases
- Automate case creation and routing

Module 3: Service Level Agreements and Entitlements

In this module students will learn how to define and use entitlements and entitlement templates, as well as service level agreements and how these tools enable case resolution.

Lessons

- Lesson 1: SLA and entitlement overview
- Lesson 2: Create and manage entitlements
- Lesson 3: Create and manage SLAs
- Lesson 4: Module summary

After completing this module, students will be able to:

- Create and use service level agreements
- Create and use entitlements

Module 4: Knowledge Management

In this module students will learn how to create and use knowledge management. Additionally, students will learn the lifecycle of knowledge articles.

Lessons

- Lesson 1: Knowledge management overview
- Lesson 2: Authoring and organizing
- Lesson 3: Use knowledge content
- Lesson 4: Manage knowledge content
- Lesson 5: Module summary

After completing this module, students will be able to:

- Create and manage knowledge content

PREREQUISITES

This course is designed for persons who are aspiring to the Microsoft 365 Enterprise Admin role and have completed one of the Microsoft 365 work load administrator certification paths.

TRAINING APPROACH

This course includes lectures, course notes, exercises and hands-on practice.

COURSE DURATION

8 Hours (1 day)

Time: 9:00am to 6:00pm

Lunch Time: 1:00pm to 2:00pm

CERTIFICATION COMPLETION

A certificate of completion is provided for all trainees attending the course.