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Course Outline :: MB-230T01::

Module Title	:	MB-230T01- Dynamics 365 for Customer Engagement for Customer Service
Duration	:	1 day

Overview

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 your time to dedicate it where you can have a greater impact, directly with your customers.

Join our team of globally recognized experts as they take you step by step from creating cases to interacting with customers to resolving those cases. Once you've resolved those cases you can learn from data analysis the key details to help you resolve similar cases faster or avoid new issues altogether.

Audience profile

A Dynamics 365 Customer Engagement Functional Consultant is responsible for performing discovery, capturing requirements, engaging subject matter experts and stakeholders, translating requirements, and configuring the solution and applications. The Functional Consultant implements a solution using out of the box capabilities, codeless extensibility, application and service integrations.

At course completion

After completing this course, you will be able to:

- Install and configure the customer service app
- Identify common customer service scenarios
- Complete a case resolution process
- Analyze customer service data
- Automate case management record processing
- Create and use knowledge articles
- Create and use entitlements and service level agreements

Course Outline

Module 1: Customer Service Overview

In this module you will learn the basics of customer service in Dynamics 365. We 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 you 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, you 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 you 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, you will be able to:

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

Module 4: Knowledge Management

In this module you will learn how to create and use knowledge management. Additionally, you 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, you 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.