COURSE OVERVIEW

Course Name:
(MB-230) Microsoft Dynamics 365 for Customer Engagement for Customer Service

COURSE DURATION: 4 Days

Gauteng:
3rd Floor, 34 Whitely Road
Melrose Arch
Johannesburg
2196

Gauteng:
192 on Bram
192 Bram Fischer Drive
Ferndale, Randburg
Johannesburg
2160

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8000

Durban:
9 Mountview Close
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INTRODUCTION

Microsoft Dynamics 365 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.

DELIVERY METHOD

Our courses have flexible delivery options:
- In-person classroom training at the Impactful training facilities
  - Johannesburg, Durban, Cape Town
- Virtual instructor-led training
- Nationally: on-site at the client

IMPACTFUL
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INTENDED AUDIENCE

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.

PREREQUISITES

This course is designed for functional consultants working with Dynamics 365 Customer Service, or functional consultants who work with other Dynamics 365 apps who want to expand their knowledge of Customer Service.

COURSE CONTENT

Get started with Dynamics 365 Customer Service

Customer service is a key aspect of any customer relationship management strategy. Microsoft Dynamics 365 Customer Service has many features that organizations can use to manage the services they provide to customers.

Managing cases with Dynamics 365 Customer Service Hub

Microsoft Dynamics 365 for Customer Service lets organizations better serve their customers and manage agent caseloads by providing a wide range of case management options. Whether agents are looking for more efficient ways to create cases or better ways to manage the case lifecycle, the case management tools in Microsoft Dynamics 365 can help them throughout the management process.

Use Microsoft Dynamics 365 Customer Service queues to manage case workloads

Customer support centers often use queues to manage the routing of cases that come in, so that they are handled in an organized and timely manner.

Create or update records automatically in Customer Service Hub

Learn how to create records by using the automatic creation and update rules functionality. Additionally, you will learn how to use multiple conditions in a single rule to create records differently based on the results.

Get started with unified routing for Dynamics 365 Customer Service

To ensure that customers are satisfied with the service that's being provided, many organizations will connect incoming work items, such as cases, phone calls, or chat requests, to the most qualified agent to assist with each specific need.

Create and manage entitlements in Microsoft Dynamics 365 Customer Service

This module will focus on Microsoft Dynamics 365 entitlements and how they're used to define and track information about support contracts. It includes information about creating and defining entitlements, setting up entitlement terms and types, defining related records, and managing the entitlement lifecycle.

Create knowledge management solutions in Dynamics 365 Customer Service

This module will focus on building knowledge management solutions by using Microsoft Dynamics 365. It provides an overview of the different knowledge management options that are available, and includes information about defining knowledge articles, managing article versions, and publishing articles.

Use knowledge articles to resolve Dynamics 365 Customer Service cases

This module will focus on how to use the Knowledge Management capabilities of Dynamics 365 to resolve cases inside Dynamics 365 including how to customize Dynamics 365 entities to consume Knowledge Articles, searching for and linking knowledge Articles, controlling article display options, and using article analytics to drive Knowledge Manage options.

Create a survey project with Dynamics 365 Customer Voice

Learn how to create a survey project with Dynamics 365 Customer Voice.

Create customer surveys with Dynamics 365 Customer Voice

Obtaining customer feedback can help you make better business decisions. In this module, you will get started with creating surveys.

Send Dynamics 365 Customer Voice surveys

Learn about the various methods that Dynamics 365 Customer Voice provides to help you send powerful surveys to capture feedback from customers and employees.

Automate Dynamics 365 Customer Voice surveys with Power Automate

Create a personalized and automated customer feedback experience by using Microsoft Power Automate.

Set up Customer Service scheduling

Dynamics 365 Customer Service includes capabilities to help you effectively schedule staff and other resources to provide service to customers at the organization's locations.

Schedule services with Customer Service scheduling

Learn how to define and schedule services with Dynamics 365 Customer Service to provide service to customers at the organization's locations.

Enhance agent productivity with Customer Service workspace

With Customer Service workspace, you can ensure that agents are equipped with the core customer service capabilities that they are accustomed to using with the Customer Service Hub app. It will also provide agents with the ability have multiple sessions open at a time in a single workspace experience.

Create custom experiences for agents with the App profile manager in Customer Service

With the App profile manager feature, your organization can create targeted app experiences for agents and supervisors who work with the Microsoft Dynamics 365 Customer Service workspace and Omnichannel for Customer Service apps.

Getting started with Omnichannel for Customer Service

With Omnichannel for Dynamics 365 Customer Service, agents can service multiple customers across different channels directly from within their Dynamics 365 environment. This module introduces the features and functionality of Omnichannel.

Route and distribute work with unified routing in Dynamics 365 Customer Service

Unified routing is an intelligent, scalable, and enterprise grade routing and assignment capability. It can direct the incoming work item to the best suited queue and agent by adhering to work item requirements and matching them with the agent's capabilities.

Deploy an SMS channel in Omnichannel for Dynamics 365 Customer Service

Learn how to use Short Message Service (SMS) messages to initiate support requests with support organizations.

Deploy chat widgets with Omnichannel for Dynamics 365 Customer Service

A chat widget lets customers connect with service agents and assists in resolving their queries quickly. This module covers the process of deploying chat widgets with Omnichannel for Dynamics 365 Customer Service.

Create smart assist solutions in Omnichannel for Dynamics 365 Customer Service

Do you want to build custom bots and plug them into environments to provide relevant recommendations to agents? This module teaches you how to create adaptive cards and custom bots and how to enable the Productivity pane.

Get started with Customer Service Insights

Microsoft Dynamics 365 Customer Service Insights uses AI to automatically group your cases into topics by using natural language understanding, such as grouping defective product cases into a single topic. Topics allow you to discover and adapt to current and emerging trends, identify problem areas, and improve brand sentiment. By pinpointing and fixing issues before they impact customers, you can deliver better customer service experiences. This module will examine how Customer Service Insights can impact your organization.

Create visualizations for Dynamics 365 Customer Service

Microsoft Dynamics 365 Customer Service includes several features for reporting and displaying data to help users manage their case workload. This module will examine the options that are provided by Customer Service.

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

The Connected Customer Service Add-in for Microsoft Dynamics 365 integrates Internet of Things (IoT) devices with Microsoft Dynamics 365 Customer Service to help organizations create a proactive approach to providing service to customers.

Register and manage devices with Connected Customer Service for Dynamics 365 and Azure IoT

Connected Customer Service integrates IoT devices with Dynamics 365 Customer Service to help organizations create an approach to providing service to customers. Additionally, it enables the registration, monitoring, and management of IoT devices into your organization's business processes.

Create custom apps for Dynamics 365 Customer Service

Learn how to use Microsoft Power Platform to create custom apps for Microsoft Dynamics 365 Customer Service.

Integrate a Power Virtual Agents bot with Omnichannel for Customer Service

Learn how to integrate a Power Virtual Agents bot with Omnichannel for Microsoft Dynamics 365 Customer Service.