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MB-230: Microsoft Dynamics 365 Customer Service
(4 Days)



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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.

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.

Prerequisites

- None

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Modulo 1: 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.

Learning objectives

In this module, you will:

- Learn about the pieces of Dynamics 365 Customer Service
- Learn how to optimize Dynamics 365 Customer Service to improve your customer relations

Modulo 3 : 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.

Learning objectives

Let's take a look at the following:

- Identify the different types of Microsoft Dynamics 365 queues that are available
- Create a queue, and define queue members
- Assign, pick, and release queue items
- Define routing rule sets to move items to specific queues
- Set up other Dynamics 365 tables so that they can be used with queues

Modulo 2: 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.

Learning objectives

Let's take a look at the following:

- Examine the case resolution process in Dynamics 365 from beginning to end
- Identify the different options that are available for creating and defining cases
- Use business process flows to guide agents through case resolution
- Review when and how parent/child cases are used

Modulo 4: 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.

Learning objectives

In this module, you will:

- Learn about automatic record creation and review instances where you can use it.
- Review the process of defining rules by using the Customer Service Hub app.
- Examine rule items, how they're used within a rule, and the process for defining them within a rule.
- Learn how to use Microsoft Power Automate to create the record in the application.
- Learn how to configure the Power Automate flow to map a contact manually.
- Examine how to use the activity monitor to review the status of rules that are being processed.

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Modulo 5 : 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.

Learning objectives

In this module, you'll:

- Learn about basic routing.
- Set up unified routing.
- Create and manage user setup.
- Learn about queues and workstreams.

Modulo 7 : 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.

Learning objectives

In this module, you will:

- Identify scenarios where knowledge articles can be used
- Create and define knowledge articles in Dynamics 365
- Manage the knowledge article lifecycle
- Control article version, translation, and publishing options

Modulo 6: 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.

Learning objectives

In this module, you will:

- Create and define entitlement records
- Control when an entitlement is applied
- Define specific entitlement terms and supported channels
- Define entitlements that are product-specific or contact-specific
- Work with multiple entitlement records for a specific customer
- Use entitlement templates to quickly create new entitlements

Modulo 8: 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.

Learning objectives

In this module, you will:

- Configure Dynamics 365 Entities for use with Knowledge Management
- Define and control Article display options on entities
- Search for and use Articles to resolve Dynamics 365 cases
- View and manage Knowledge Article Analytics

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Modulo 9 : Create a survey project with Dynamics 365 Customer Voice

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

Learning objectives

In this module, you will:

- Learn about Dynamics 365 Customer Voice and how it can benefit an organization.
- Create your first project.
- Discover the high-level features and functionality of a project.

Modulo 11 : 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.

Learning objectives

In this module, you will:

- Learn how to create email templates to send from Dynamics 365 Customer Voice.
- Learn how to email surveys directly from Dynamics 365 Customer Voice.
- Discover the different methods of sending surveys, including with direct links and QR codes.
- Send survey reminders and learn how to interpret the survey distribution report.

Modulo 10: 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.

Learning objectives

In this module, you will:

- Create your first survey with a theme and custom branding.
- Learn when to use branching rules to guide respondents through a survey.
- Personalize surveys with variables.

Modulo 12: Automate Dynamics 365 Customer Voice surveys with Power Automate

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

Learning objectives

In this module, you will:

- Learn about the role that Power Automate plays when you are setting up projects and surveys in Dynamics 365 Customer Voice.
- Discover the purpose of using variables to further customize surveys.
- Create a flow in Power Automate to create and send survey invitations to customers.

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Modulo 13 : 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.

Learning objectives

In this module, you will:

- Get started with Customer Service scheduling.
- Learn how to set up Customer Service scheduling.
- Discover how to define resources.

Modulo 15 : 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.

Learning objectives

In this module, you will:

- View and edit records.
- Work with cases.

Modulo 14: 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.

Learning objectives

In this module, you will:

- Learn how to define services.
- Discover how to configure fulfillment preferences.
- Learn how to create and schedule service activities.

Modulo 16: Create custom experiences for agents with agent experience profiles in Customer Service

With agent experience profiles, 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.

Learning objectives

In this module, you will:

- Learn about agent experience profiles, when they're available, and how to access them.
- Create custom profiles with the user interface.
- Define which channels and productivity features are available within a profile.
- Configure session templates.
- Create application tab templates.
- Create notification templates and use notification fields.
- Review associate session and notification templates with workstreams.

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Modulo 17 : Get 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.

Learning objectives

This module explains these concepts:

- Agent experience and managing sessions.
- Conversations and customer summaries.

Modulo 19 : 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.

Learning objectives

In this module, you'll:

- Configure an SMS channel.
- Configure phone numbers and messaging accounts such as TeleSign and Twilio.
- Configure SMS workstream and workstream options.
- Route SMS conversations.
- Set up additional settings.

Modulo 18: 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.

Learning objectives

In this module, you'll:

- Set up the components that are involved in classification and assignment of work items.
- Classify work items and route work to employees.
- Set up queues to distribute work.
- Run diagnostics.

Modulo 20: Deploy chat widgets with Omnichannel for Dynamics 365 Customer Service

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

Learning objectives

In this module, you:

- Create a chat channel.
- Allow chat transcripts and file downloads.
- Work with prechat and post-chat surveys.
- Embed a chat widget in a portal.

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Modulo 21 : 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.

Learning objectives

In this module, you will:

- Write adaptive cards that render content for a smart assist bot.
- Build a smart assist bot.
- Create a bot user.
- Add a smart assist bot to a workstream.
- Enable the Productivity pane.

Modulo 23 : 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 examines the options that are provided by Customer Service.

Learning objectives

This module explains how to:

- Review the data reporting and visualization options in Dynamics 365 Customer Service.
- Discover how to create charts.
- Learn how to use and create tier 1 and tier 2 interactive dashboards.
- Discover how to use Microsoft Power BI to view Dynamics 365 Customer Service data.

Modulo 22: 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.

Learning objectives

In this module, you will:

- Learn about Customer Service Insights and what it can provide for an organization.
- Examine how to configure Customer Service Insights for your organization.
- Learn about installing Power BI app for Customer Service Insights to gain insights.
- Discover the different dashboards that are available.

Modulo 24: 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.

Learning objectives

This module explains the following concepts:

- The Connected Customer Service Add-in for Microsoft Dynamics 365.
- How to choose a deployment type.
- How to install the Connected Customer Service Add-in.
- Customer assets and IoT alerts.

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Modulo 25 : 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.

Learning objectives

This module explains how to:

- Register IoT devices.
- Create IoT alerts and convert alerts to cases.
- Understand the required security roles for Connected Customer Service.
- Manage interactions with IoT devices.
- Send commands to IoT devices.

Modulo 27 : Integrate a Microsoft Copilot Studio copilot with Omnichannel for Customer Service

Learn how to integrate a Microsoft Copilot Studio copilot with Omnichannel for Microsoft Dynamics 365 Customer Service.

Learning objectives

This module explains how to:

- Create a Microsoft Entra ID application.
- Configure the Microsoft Copilot Studio copilot.
- Configure Omnichannel for Customer Service.

Modulo 26: 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.

Learning objectives

In this module, you will:

- Learn how you can use Microsoft Power Platform to customize Dynamics 365 Customer Service.
- Learn how to create apps from Microsoft Power Apps for Customer Service.
- Learn how to deploy a self-service portal for Customer Service.
- Discover how to customize case management.

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