

# MB-230T01 Dynamics 365 for Customer Engagement for Customer Service

Price  
**\$1,785.00**

Duration  
**3 Days**

Delivery Methods  
**VILT, Private Group**



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

## Who Should Attend

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.

**This class is not currently scheduled.**

[Contact us and we will help you get the training you need!](#)

## Course Objectives

- 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
- Work with Omnichannel
- Work with Connected Customer Service
- Work with Customer Service Scheduling
- Work with Customer Service Insights
- Work with Microsoft Power Platform
- Work with Customer Service workspaces

## **Agenda**

### **1 - WORK WITH CASES**

- Get started with Cases
- Managing Cases
- Use queues to manage case workloads
- Create or update records automatically
- Unified routing

### **2 - WORK WITH ENTITLEMENTS AND SERVICE LEVEL AGREEMENTS**

- Create and manage entitlements
- Create and manage service level agreements

### **3 - WORK WITH KNOWLEDGE MANAGEMENT**

- Create knowledge management solutions
- Use knowledge articles to resolve cases
- Create and manage SLAs

### **4 - CREATE SURVEYS WITH CUSTOMER VOICE**

- Create a survey project
- Create surveys
- Send surveys
- Automate surveys

### **5 - SCHEDULE SERVICES**

- Configure Customer Service Scheduling
- Schedule services

### **6 - WORK WITH DYNAMICS 365 CUSTOMER SERVICE WORKSPACES**

- Enhance agent productivity
- App profile manager

## **7 - OMNICHANNEL FOR DYNAMICS 365 CUSTOMER SERVICE**

- Getting started
- Routing and work distribution
- Deploy an SMS channel
- Deploy chat widgets
- Create smart assist solutions

## **8 - MANAGE ANALYTICS AND INSIGHTS**

- Get started
- Create visualizations

## **9 - CONNECTED CUSTOMER SERVICE**

- Getting started
- Registering and managing devices

## **10 - IMPLEMENT MICROSOFT POWER PLATFORM**

- Create custom apps
- Integrate a Power Virtual Agents bot