

MICROSOFT DYNAMICS 365 FOR CUSTOMER SERVICE

Course Code: 6731

This course provides students with a detailed hands-on experience of the Customer Service Hub and associated features.

Attendees of this course will gain an in-depth understanding of the Service Case Management Process in Dynamics 365, including learning how to track and resolve customer requests with Case records, collaborate on issues using Queues, use Service Level Agreements (SLA) to manage service entitlements and utilize the Knowledge Base to resolve customer issues faster.

Customer Service Insights, Service Data Analysis, AI features, Service Reports, Charts and Dashboards are also presented.

This course has been updated to the October 2020 Release Wave 2 of Microsoft Dynamics 365 and the Power Platform.

For further information about this course and complimenting Dynamics 365 and Power Platform courses please contact us at www.dynamics365courses.com.

What You'll Learn

After completing this course, students will be able to:

- Navigate and explore the Customer Service Hub in Dynamics 365
- Understand the features and tools that exist in Microsoft Dynamics 365 for CSR's and Service Managers
- Be familiar with the stages of the Service Case Management Process in Microsoft Dynamics 365
- Understand the fundamentals of Case Management. Be able to track, manage and resolve customer service requests using Case records in Microsoft Dynamics 365
- Know how to assign, resolve, reactivate, cancel and delete Case records
- Understand the significance of Service Level Agreements and how to create a Customer Schedule and apply SLA's to Customer and Case records through Entitlements
- How to setup and configure Queues and use Queue's to collaborate on Cases with other CSR's and Teams.
- How to implement a Case Routing Rules, and utilize Queue Items in Processes

- Understand the process to create and manage Knowledge Articles in the Knowledge Base
- Be familiar with the Knowledge Base approval process
- How to search the Knowledge Base and relate Knowledge Articles to Case records
- Effectively interact with the Customer Service Hub Interactive Filters, Visualizations and Dashboards
- Perform Case Management in the Customer Service Hub
- Explore the Service Reports in Microsoft Dynamics 365
- Explore the Service Charts and Dashboards and create a custom Service Dashboard in Microsoft Dynamics 365
- Configure Customer Service Insights and understand the Artificial Intelligence features for Customer Service in Dynamics 365

Who Needs to Attend

This course is intended for Customer Service Representatives (CSR), Service Managers and end-users who have an interest in the Service components of Dynamics 365. Students should have an existing working knowledge of either Microsoft Dynamics 365 or Microsoft Dynamics CRM. As a minimum, students should attend the prerequisite course 'Introduction to Microsoft Dynamics 365'.

Prerequisites

Before attending this course, students must have:

- A working knowledge of Microsoft Dynamics 365 or Microsoft Dynamics CRM
- OR
- Successful completion of the 'Introduction to Microsoft Dynamics 365' course

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CLASSROOM LIVE

\$675 CAD

1 Day

Classroom Live Outline

Module 1: Introduction

This module provides the attendee with an introduction to the concept of Customer Service the Microsoft Dynamics 365.

Lessons

- Examine common Customer Service Scenarios
- An Introduction to Service in Dynamics 365
- The Dynamics 365 Platform
- Dynamics 365 Service Fundamentals
- Security Considerations
- Where to get Help

Further Reading and Resources

Module 2: Case Management

This module presents the Service Case Management Process in Microsoft Dynamics 365. We also examine the various stages a Case record can go through during its lifespan, and how Service Level Agreements can be used with Cases to define and track Service Entitlements.

Lessons

- The Case Management Process
- Working with Case Records
- Working with the Case Form
- Case Assignment and Routing
- Cases and Activities
- Resolving Cases

- Reactivating, Cancelling and Deleting Cases
- Service Level Agreements

Module 3: Working with Queues

This module presents the concepts of Service Queues in Microsoft Dynamics 365. We examine common Service scenarios where Queues can be useful, and step through the process to create and manage Queues. We also look at how Workflow and Routing Rules can automate Case assignment using Queues.

Lessons

- Introduction to Service Queues
- Common Service Queue Scenarios
- Creating and Managing Queues
- Working with Queue Items
- Case Routing Rules
- Processes and Queues

Module 4: The Customer Service Hub

This module presents how CSR's and Service Managers can benefit from the features provided by the Customer Service Hub. We look at the rich controls and dynamic streams of information presented by this alternative interface to Microsoft Dynamics 365. Finally, we look at the alternative approaches to Case management, Knowledge Articles and tracking Service information.

Lessons

- Introduction the Customer Service Hub
- The Tier 1 Dashboard
- The Tier 2 Dashboard
- The My Knowledge Dashboard
- The Knowledge Manager Dashboard
- Working with Cases in the Hub
- Working with Knowledge Articles in the Hub
- Working with Visualizations and Filters in the Hub

Module 5: Service Insights and Analysis

This module looks at the different methods available to analyse service information that is stored in Microsoft Dynamics 365. We look at the out of the box Service Reports, Charts and Dashboards. This module also demonstrates the Chart and Dashboard designer. Finally, the Customer Service Insights App is presented to showcase the Artificial Intelligence features in Dynamics 365.

Lessons

- Introduction to Service Analysis in Dynamics 365
- The Service Reports
- Working with Service Charts
- Working with Service Dashboards
- Working with Artificial Intelligence and Customer Service Insights

Classroom Live Labs

Module 1: Introduction

Lab 1: Exploring Customer Service Features

- Explore the Customer Service features in Dynamics 365

Module 2: Case Management

Lab 1: Working with Cases

- Create a Case record
- Assign a Case record
- Resolve a Case record
- Reactivate a Case record
- Cancel a Case record

Lab 2: Service Level Agreements and Cases

- Create a Customer Schedule for the SLA
- Create a new Service Level Agreement
- Activate a Service Level Agreement
- Create an Entitlement
- Relate a Case to a Service Level Agreement

Module 3: Working with Queues

Lab 1: Create a Case Routing Queue

- Creating Queues
- Create a Case Routing Rule
- Route a Case to a Queue
- Working with Queues and Queue Items

Module 4: The Customer Service Hub

Lab 1: Using the Customer Service Hub

- Explore the Customer Service Hub
- Manage Streams in the Customer Service Hub
- Resolve a Case in the Customer Service Hub
- Create a KB Article in the Customer Service Hub
- Manage KB Articles in the Customer Service Hub
- Relating a Case to a Customer Service Hub KB Article

Module 5: Service Insights and Analysis

Lab 1: Explore the Service Reports

- Exploring the Case Summary Table Report
- Exploring the Neglected Cases Report

Lab 2: Explore the Service Charts and Dashboards

- Explore the Case Charts

- Create a custom Service Chart
- Explore the Service Dashboards
- Create a custom Service Dashboard

Lab 3: Explore Customer Service Insights

- Configure Customer Service Insights
- Working with Customer Service Insights Dashboards
- Working with Customer Service Insights Dashboard Filters
- Working with Customer Service Insights Visualizations
- Working with Customer Service Insights Topics

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VIRTUAL CLASSROOM LIVE

\$675 CAD

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Virtual Classroom Live Outline

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- Security Considerations
- Where to get Help

Further Reading and Resources

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- Working with Service Dashboards
- Working with Artificial Intelligence and Customer Service Insights

Virtual Classroom Live Labs

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- Resolve a Case in the Customer Service Hub
- Create a KB Article in the Customer Service Hub
- Manage KB Articles in the Customer Service Hub
- Relating a Case to a Customer Service Hub KB Article

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Lab 1: Explore the Service Reports

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- Exploring the Neglected Cases Report

Lab 2: Explore the Service Charts and Dashboards

- Explore the Case Charts

- Create a custom Service Chart
- Explore the Service Dashboards
- Create a custom Service Dashboard

Lab 3: Explore Customer Service Insights

- Configure Customer Service Insights
- Working with Customer Service Insights Dashboards
- Working with Customer Service Insights Dashboard Filters
- Working with Customer Service Insights Visualizations
- Working with Customer Service Insights Topics

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