

## MB-MB230T01: MICROSOFT DYNAMICS 365 CUSTOMER SERVICE



DURATION	LEVEL	TECHNOLOGY	DELIVERY METHOD	TRAINING CREDITS
4 Days	Intermediate	Dynamics	Instructor-led	NA

### INTRODUCTION

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.

### 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 OBJECTIVES

This course is designed to enhance skills in managing and optimizing customer service processes. Key objectives include:

- Installing and configuring the Dynamics 365 Customer Service app
- Utilizing service-level agreements (SLAs) and entitlements.
- Leveraging knowledge management to improve customer support.
- Engaging customers through omnichannel communication.
- Scheduling services and analyzing customer service data for insights.
- Automating workflows and extending capabilities using the Power Platform

### COURSE CONTENT

**Module 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.

#### Lessons

- Introducing Dynamics 365 Customer Service.
- Customer Service core components.
- Understand the modern customer journey.

– Check your knowledge.  
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

**Module 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.

#### Lessons

- Introducing Dynamics 365 Customer Service.
- Case management overview.
- Case creation and lifecycle.
- Considerations for case creation automation.
- Exercise - Create and resolve cases.
- Case management scenarios.
- Case management dashboard scenarios.

– Case management work with cases scenarios.  
– Work with status reason transitions.

- Exercise - Manage cases in Microsoft Dynamics 365.
- Check your knowledge.

In this module, you will:

- 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.
- Identify when similar cases should be merged.
- Work with case status reason transitions, and configure custom status transitions.

### Module 3: Manage cases with Dynamics 365 Customer Service workspace

With Dynamics 365 Customer Service, an organization can provide service to their customers in many ways, depending on the specific needs of the customer, the organization's service model, and other determining factors. This module examines the Customer Service features that you can use to support a case management solution.

#### Lessons

- Introduction
- Get started with Customer Service workspace
- Case creation and life cycle
- Automate case creation
- Case management scenarios
- Use Copilot to assist in resolving customer issues
- Exercise - Create and resolve cases in Dynamics 365
- Check your knowledge
- Summary

In this module, you will:

- Explore the Customer Service workspace.
- Create cases and automate case creation.
- Learn about case management.
- Create and resolve cases.

### Module 4: 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.

#### Lessons

- Introduction to Microsoft Dynamics 365 queues.
- Configure tables for queues.
- Create a Microsoft Dynamics 365 queue.
- Work with queues.
- Exercise - Use queues to manage case workloads.
- Routing rule sets.
- Exercise - Use routing rules to assign cases to specific queues.
- Check your knowledge.

In this module, you will:

- 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.

### Module 5: Service representative collaboration in Dynamics 365 Customer Service

Dynamics 365 Customer Service includes multiple collaboration features to help representatives identify experts. It also helps representatives engage with and set up meetings with their peers in Microsoft Teams. Organizations can use the available collaboration features to turn their business into a unified customer service center.

#### Lessons

- Introduction
- Set up Microsoft Teams chat in Customer Service
- Use embedded Teams chat in Customer Service
- Microsoft Teams meeting integration in Dynamics 365
- Set up customer support swarming for complex cases
- Use customer support swarming
- Check your knowledge
- Summary

In this module, you will:

- Examine embedded chat by using Teams.
- Learn about customer support swarming by using Teams.
- Share Dynamics 365 records within Microsoft Teams.

### Module 6: Configure Copilot in Dynamics 365 Customer Service

Learn how to configure and use Copilot functionality, which assists representatives by providing real-time AI assistance so that they can automate time-consuming tasks.

#### Lessons

- Introduction
- Turn on Copilot in Customer Service
- Manage fields for case summaries
- Customize Copilot conversation summaries
- Display the Copilot case summary on custom case forms
- Check your knowledge
- Summary

In this module, you will:

- Turn on Copilot and features, such as conversation and case summaries.
- Manage fields that provide summaries for representatives.
- Customize how the system delivers conversation summaries to users.
- Configure how to display Copilot features on custom forms.

### Module 7: 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.

#### Lessons

- Introduction.
- Set up rules to create or update records automatically.
- Configure rules for creating or updating records automatically.
- Map records manually with Power Automate.
- Complete and activate your rule.
- Use the activity monitor to review and track rules.
- Check your knowledge.

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.

### Module 8: Work with service-level agreements in 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.

## Lessons

- Introduction
- Work with business closures and working hours
- Create and define service-level agreements
- Define SLA items
- Define custom KPIs
- Manage SLAs
- Check your knowledge
- Summary

In this module, you'll:

- Set up business hours, closures, and holiday calendars.
- Create service-level agreements and define their details.
- Define custom KPIs.
- Manage service-level agreements.

### **Module 9: 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.

## Lessons

- Overview of entitlements.
- Create entitlement records.
- Work with entitlement channels.
- Other considerations.
- Exercise - Manage support contracts by using entitlements.
- Define entitlement templates.
- Check your knowledge.

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

### **Module 10: 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.

## Lessons

- Knowledge management overview.
- Create and define knowledge articles.
- Knowledge article lifecycle.
- Manage knowledge article versions, categories, and translations.
- Knowledge article publication.
- Exercise - Create and maintain knowledge articles.
- Check your knowledge.

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

### **Module 11: Search and filter knowledge articles by using Dynamics 365 Customer Service**

This module examines how to set up the many different searching and filtering capabilities that are available in Dynamics 365 Customer Service.

## Lessons

- Introduction
- Knowledge article search filters
- Search for article content from external search providers
- Manage integrated search providers
- AI suggestions for article keywords and descriptions
- Knowledge article analytics
- Check your knowledge
- Summary

In this module, you will:

- Learn about search filters.
- Learn about federated search.
- Learn about AI suggested keywords.
- Learn about knowledge search analytics.

### **Module 12: 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.

## Lessons

- Knowledge article and case resolution overview
- Enable and configure entities for Knowledge Search
- Configure article search and display options
- Search for knowledge articles
- Exercise - Resolve Microsoft Dynamics 365 cases by using knowledge articles
- Article analytics
- Check your knowledge

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

### **Module 13: Create custom experiences for service representatives with agent experience profiles in Customer Service**

With agent experience profiles, your organization can create targeted app experiences for service representatives and supervisors who work with the Microsoft Dynamics 365 Customer Service workspace and Omnichannel for Customer Service apps.

## Lessons

- Introduction
- Create and use agent experience profiles to manage apps
- Application tab templates
- Session templates
- Manage notification settings and templates
- Use templates in workstreams
- Check your knowledge
- Summary

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.

### **Module 14: Enhance representative 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.

#### Lessons

- Introduction.
- Explore the Customer Service workspace user interface.
- View and edit records.
- Work with case records.
- Use the Productivity pane in Customer Service workspace.
- Check your knowledge.

In this module, you will:

- View and edit records.
- Work with cases.

### Module 15: Enhance service representative productivity and personalization in Omnichannel for Customer Service

With Omnichannel for Customer Service, organizations can offer support across multiple channels and can engage multiple customers simultaneously through dedicated sessions. This feature ensures that agents have information that's relevant to what they're working on and in one location. Additionally, agents can switch between active sessions as needed.

#### Lessons

- Introduction
- Quick replies
- Use personal quick replies
- Enable sound and missed notifications for conversations
- Enable auto-assignment of conversations
- Enable sharing of knowledge articles
- Check your knowledge
- Summary

In this module, you will:

- Learn about quick replies.
- Learn about notifications.
- Assign conversations.

### Module 16: Enhance service representative productivity and personalization in Customer Service Hub

Learn how to configure historical information and communication tools to help your service representatives be more productive.

#### Lessons

- Introduction
- Configure the timeline for service representatives
- Use email
- Configure email for service representatives
- Check your knowledge

#### Summary

In this module, you will:

- Learn about the timeline control and how to modify it to fit the needs of an organization.
- Examine how service representatives can use the email functionality in Microsoft Dynamics 365.
- Review the process of configuring email functionality for service representatives. Send survey reminders and learn how to interpret the survey distribution report.

### Module 17: Get started with Dynamics 365 Productivity Tools

Dynamics 365 Productivity Tools helps representatives perform their daily operations faster, efficiently, and in a process-compliant manner.

#### Lessons

- Introduction
- Work with macros
- Use automation to pass parameters
- Work with agent scripts
- Smart assist
- Check your knowledge
- Summary

In this module, you will:

- Learn how to use macros.
- Discover how to use automation.
- Explore using agent scripts.
- Learn how to use smart assist.

### Module 18: 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.

#### Lessons

- Introduction.
- Work with Microsoft Adaptive Cards.
- Build a smart assist bot.
- Integrate a smart assist bot with Omnichannel for Customer Service.
- View AI-suggested similar cases and knowledge articles.
- Check your knowledge.

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

### Module 19: 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 connect incoming work items, such as cases, phone calls, or chat requests, to the most qualified representative to assist with each specific need.

#### Lessons

- Introduction
- Route cases by using basic routing rule sets
- Set up unified routing
- Create and manage users
- Create and manage queues for unified routing
- Set up workstreams for record routing
- Check your knowledge
- Summary

In this module, you will:

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

### Module 20: 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 representative by adhering to work item requirements and matching them with the representative's capabilities.

#### Lessons

- Introduction
- Set up work classification
- Route items to queues
- Set up work assignments in queues
- Get started with intelligent routing
- Diagnostics
- Check your knowledge
- Summary

In this module, you will:

- 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.

### Module 21: Use skill-based routing in Dynamics 365 Customer Service

The unified routing feature in Dynamics 365 Customer Service includes a skill-based routing solution that helps organizations more effectively handle customer-

related issues. Its configurable interface helps ensure that conversations are routed to agents who have the skills and proficiency levels that match those levels that are defined on the incoming conversation.

Lessons

- Introduction
- Define skill-rating models
- Skill types
- Assign skills to representative
- Define a default skill-matching algorithm for a workstream
- Attach skills to work items
- Build intelligent skill-finder models
- Check your knowledge
- Summary

In this module, you will:

- Skill rating models.
- How to assign representatives to skills.
- Intelligent skill finder.

## Module 22: Entity record routing with Omnichannel for Dynamics 365 Customer Service

The Dynamics 365 Customer Service solution allows organizations to manage and resolve issues that customers are encountering. In a traditional scenario, you would perform case management by using the core components of Customer Service. One of those core components is entity record routing, which is explained in this module.

Lessons

- Introduction
- Entity record routing
- Entity routing rule sets
- Route triggering
- Check your knowledge
- Summary

In this module, you will:

- Rule sets.
- Route triggering.

## Module 23: 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.

Lessons

- Introduction to Omnichannel for Customer Service.
- Use the agent interface.
- Manage sessions and work with applications.
- Work with conversations.
- Work with customer information.
- Reporting and analysis
- Work with AI features.

- Helping a customer service rep's productivity.
  - Check your knowledge.
- In this module, you will:
- Agent experience and managing sessions.
  - Conversations and customer summaries.

## Module 24: Deploy chat widgets with Omnichannel for Dynamics 365 Customer Service

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

Lessons

- Set up a workstream for chat.
- Create a chat channel.
- Allow chat transcripts and file downloads.
- Work with prechat and post-chat surveys.
- Embed a chat widget in a portal.
- Use proactive chat.
- Check your knowledge.

In this module, you will:

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

## Module 25: Deploy a Voice channel in Dynamics 365 Customer Service

The Voice channel in Dynamics 365 Customer Service includes many different features and functionalities that call center representatives and supervisors can use. Additionally, it can help improve your customers' overall experience when they're engaging over voice channels.

Lessons

- Introduction
- Set up and provision the Voice channel
- Define voice queues
- Set up a voice workstream
- Call routing
- Make and receive calls
- Historical analytics, reports, and call insights
- Check your knowledge
- Summary

In this module, you will:

- Learn how to set up and provision the Voice channel.
- Define voice queues.
- Set up voice workstreams.
- Learn about call routing.

## Module 26: 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.

Lessons

- Introduction
- Configure phone numbers and messaging accounts
- Configure SMS workstream
- Configure SMS workstream options
- Route SMS conversations
- Configure Additional Settings
- Check your knowledge

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.

## Module 27: Deploy social messaging channels in Omnichannel for Dynamics 365 Customer Service

In addition to requesting support through live chat channels, Omnichannel for Microsoft Dynamics 365 Customer Service helps your organization extend its service offerings to some of the most common social messaging platforms that are being used today. This module examines how to use and incorporate different social messaging platforms into an Omnichannel for Dynamics 365 Customer Service deployment.

Lessons

- Introduction
- Configure a Facebook channel
- Configure a LINE channel
- Configure a WhatsApp channel through Twilio
- Configure a WeChat channel
- Configure additional options
- Check your knowledge
- Summary

In this module, you'll:

- Examine which channels are available and review the prerequisites for getting started with social messaging.
- Discover the procedure for creating social messaging work streams.
- Review the process for configuring a Facebook message channel and defining Facebook pages.
- Learn about the process for configuring a LINE message channel.
- Learn about the process for configuring a WhatsApp message channel by using Twilio.

- Review the process for adding a WeChat message channel.

## Module 28: Set up Apple Message for Business and Google Business Messages as channels in Dynamics 365 Customer Service

This module examines how to deploy services as channels in Omnichannel for Customer Service and how to set up many different features that are available.

### Lessons

- Introduction
- Set up a Google Business Messages channel
- Set up a Google Business Messages workstream
- Set up an Apple Messages for Business channel
- Set up an Apple Messages for Business workstream
- Rich messages
- Publish and edit rich messages
- Workstream association
- Rich messages in conversation control
- View and send rich messages
- Manage authentication settings
- Create payment profiles
- Check your knowledge
- Summary

In this module, you'll:

- Set up the Google Business Messages channel and workstream.
- Set up the Apple Messages for Business channel and workstream.
- Publish and edit rich messages.
- Manage authentication settings.
- Create payment profiles.

## Module 29: 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.

### Lessons

- Introduction
- Create a Microsoft Entra ID application
- Configure the Microsoft Copilot Studio copilot
- Configure Omnichannel for Customer Service
- Configure a post-call survey
- Check your knowledge
- Summary

In this module, you'll:

- Create a Microsoft Entra ID application.
- Configure the Microsoft Copilot Studio copilot.

- Configure Omnichannel for Customer Service.

## Module 30: Create a survey project with Dynamics 365 Customer Voice

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

### Lessons

- Introduction
- Dynamics 365 Customer Voice
- Projects in Dynamics 365 Customer Voice
- Create your first project
- Exercise - Create a basic project
- Check your knowledge
- Summary

In this module, you'll:

- 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.

## Module 31: Create customer surveys with Dynamics 365 Customer Voice

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

### Lessons

- Introduction
- Survey headers and branding
- Add branching logic to surveys
- Personalize a survey with variables
- Add satisfaction metrics to a survey and project
- Add multiple languages for your surveys
- Exercise - Create a basic survey
- Check your knowledge
- Summary

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.

## Module 32: 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.

### Lessons

- Introduction
- Create and personalize email templates
- Translate email templates into other languages

- Email a survey
- Upload CSV files
- Use links and QR codes
- Analyze survey reports
- Exercise - Create an email template
- Check your knowledge
- Summary

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.

## Module 33: Automate Dynamics 365 Customer Voice surveys with Power Automate

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

### Lessons

- Introduction
- Send a survey with Power Automate
- Create an invitation
- Expand variables to further customize surveys
- Use the locale variable for multilingual surveys
- Use variables for follow-up actions
- Exercise - Create a survey invitation
- Check your knowledge
- Summary

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.

## Module 34: Embed surveys in your website with Dynamics 365 Customer Voice

In this module, learn how to embed your survey into your website.

### Lessons

- Introduction
- Prepare the survey to use on a website
- Embed a survey in your website

- Use context data from the survey responses
- Exercise - Embed a survey on a website
- Check your knowledge
- Summary

In this module, you will:

- Learn about the use cases for embedding surveys into a website.
- Learn how to embed a survey into a website.
- Use variables when embedding a survey and extract the variables from the context data or a survey response.

## Module 35: Create customer Power BI reports in Dynamics 365 Customer Voice

Learn how to create reports and dashboards from your Dynamics 365 Customer Voice data by using Microsoft Power BI.

Lessons

- Introduction
- Use the Dynamics 365 Customer Voice Power BI template
- Connect to Dynamics 365 Customer Voice data with Power BI
- Create customized Power BI reports
- Calculate the Net Promoter Score for Dynamics 365 Customer Voice data
- Exercise - Connect to Dynamics 365 Customer Voice data with Power BI
- Check your knowledge
- Summary

In this module, you will:

- Get a basic introduction to Power BI.
- Learn how to use the Dynamics 365 Customer Voice Power BI template.
- Learn how to connect to your Dynamics 365 Customer Voice data through Power BI.
- Create a customized Power BI report and calculate your Net Promoter Score.

## Module 36: 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.

Lessons

- Introduction
- Set up service scheduling
- Define resources
- Define facilities and sites
- Check your knowledge
- Summary

In this module, you will:

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

## Module 37: 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.

Lessons

- Introduction.
- Set up fulfillment preferences.
- Create service activities.
- Schedule service activities.
- Check your knowledge.

In this module, you will:

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

## Module 38: 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.

Lessons

- Introduction to Customer Service Insights
- Configure Customer Service Insights
- Discover Customer Service Insights dashboards
- Discover Knowledge search analytics
- Check your knowledge
- Summary

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.

## Module 39: 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.

Lessons

- Introduction.
- Create and use charts.
- Create dashboards for Customer Service.
- Use Power BI to view Customer Service data.
- Check your knowledge.

In this module, you will:

- 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.

## Module 40: 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.

Lessons

- Introduction.
- Deployment.
- Installation and setup.
- Customer assets and IoT alerts.
- Check your knowledge.

In this module, you will:

- 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.

## Module 41: 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.

### Lessons

- Introduction.
- Generate alerts from IoT devices.
- Device management and interaction.

- Create and send commands to IoT devices.
  - Check your knowledge.
- In this module, you will:
- 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.

## ASSOCIATED CERTIFICATIONS & EXAM

This course will prepare delegates to write the Microsoft MB-230: Microsoft Dynamics 365 Customer Service Functional Consultant exam.