MB-230: Microsoft Dynamics 365 Customer Service Functional Consultant

Course outline

Standard Duration: 32 Hours

Learning Path 1: Case management

Get started as a customer service representative. This learning path focuses on the case management capabilities of Dynamics 365 Customer Service including options for creating cases, managing the case resolution process, working with case hierarchies, and merging similar cases. Queues can be used to maintain and manage case workloads for customer service agents.

Lessons

- Get started with Dynamics 365 Customer Service
- Managing cases: Managing cases with Dynamics 365 Customer Service
- Queues: Use Microsoft Dynamics 365 Customer Service queues to manage case workloads
- Record creation rules: Create or update records automatically in Customer Service Hub
- Unified Routing: Unified Routing in Dynamics 365 Customer Service

Lab Practice:
Lab: Validate lab environment
Lab: Creating cases
Lab: Creating queues
Lab: Resolving cases
Lab: Routing cases

After completing this module, students will be able to:
- Customer Service has components to capture service requests and manage their resolution
- Cases can be created manually or automatically
- Customer Service manages work through queues and sophisticated routing capabilities

Learning Path 2: Entitlements and Service Level Agreements

Dynamics 365 Customer Service includes the ability to define service-level agreements (SLAs) to help organizations meet the desired service levels when providing support to customers. With SLAs, you can track common key performance indicators (KPIs), such as First Response Time and Call Resolution Time, for every case that's submitted. Additionally, you can create custom KPIs that track business-specific items that are important to your organization.

Lessons

- Entitlements
- Service Level Agreements

Lab: Entitlements and templates

After completing this module, students will be able to:
- Entitlements manage support or maintenance contracts for customers
- Service Level Agreements define the level of service to customers based on Key Performance Indicators (KPIs)
- Entitlements and SLAs can be combined to define the level and amount of service for a customer

Learning Path 3: Knowledge Management

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
- Create knowledge management solutions in Dynamics 365 Customer Service
- Configure knowledge management article searching functionality
- Use knowledge articles to resolve Dynamics 365 Customer Service cases

Lab Practice:
Lab: Create knowledge articles

After completing this module, students will be able to:
- Knowledge management provides comprehensive features for authoring, review, versions, translating, and publishing articles
- Tables other than Case can be enabled for Knowledge Base search
- Users can link knowledge articles to cases and email the articles to customers

Learning Path 4: Multi-session experiences

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.

Lessons

- Enhance agent productivity with Customer Service workspace
- Create custom experiences for agents with the App profile manager in Customer Service

Lab Practice:
Lab: Customer Service workspace
Lab: Agent experience profiles

After completing this module, students will be able to:
- With Customer Service workspace, agents can be more productive by using the

core customer service capabilities with the ability to work with multiple sessions at once in a single workspace experience

- Workspaces allows you to create different experiences for users in the Customer Service workspace and Omnichannel for Customer Service apps
- Agent experience profiles specify the session, application, and notification templates that are used when a user is in the app

Learning Path 5: Routing

In Dynamics 365 Customer Service, routing refers to the process of automatically assigning and directing customer service cases, tasks, or work items to the appropriate individuals or teams within an organization. This routing functionality is a crucial aspect of efficiently managing customer service operations and ensuring that customer inquiries and issues are addressed promptly.

Lessons
- Examine routing options available
- Basic Routing
- Getting Started with Unified Routing

Lab: Self Practice recommended. No official Lab is available.

After completing this module, students will be able to:

- The Basic Routing feature helps organizations quickly create simple case routing solutions.

- Unified Routing is an intelligent routing solution that assists organizations in routing and distributing work to their agents.

Learning Path 6: Omnichannel for Dynamics 365 Customer Service

Developing and deploying true omnichannel solutions are critical to the success of any organization that provides customer service to its customers. By ensuring a unified and contextual experience regardless of the channel used, organizations can increase customer satisfaction, resolve issues faster, and increase revenue. With Dynamics 365's Omnichannel for Customer Service solution, organizations deploy a true Omnichannel solution that exists inside the Dynamics 365 organization that they use every day.

Lessons
- Get started with Omnichannel for Customer Service
- Configure message channels in Omnichannel for Customer Service
- Deploy chat widgets in Omnichannel for Customer Service

Lab: Self Practice recommended. No official Lab is available.

After completing this module, students will be able to:

- Configure Omnichannel for Customer Service
- Deploy Chat Wiget
- Configure Unified Routing

Learning Path 7: Customer Voice

Dynamics 365 Customer Voice provides organizations with a powerful survey tool to capture, analyze, and then act on customer and employee feedback. Consider all the touch points where you interact with a client, creating either a positive, neutral, or negative experience. These experiences are often referred to as moments of truth, which generate a lasting impression of your organization. It's at these points that gathering feedback is essential.

Lessons
- Create a survey project with Dynamics 365 Customer Voice
- Create surveys with Dynamics 365 Customer Voice
- Send Dynamics 365 Customer Voice surveys
- Automate Dynamics 365 Customer Voice surveys with Power Automate

Lab Practice:

Lab: Create survey

After completing this module, students will be able to:

- Customer Voice enables the creation of surveys to gather feedback from customers
- Surveys can be distributed by email and embedded in a website
- Power Automate cloud flows can be used to distribute surveys to customers

Learning Path 8: Service scheduling

Many organizations perform service-based activities for their customers, such as repairs, health and beauty services, or product installations. Depending on the organization, workers can be dispatched into the field to perform work. Often, the services are performed at their service locations. For example, as a customer, you might take a pet to the groomers, take in an automobile for service, need a piece of clothing altered, or request an aftermarket item to be installed. Regardless of the service model that an organization uses, they need to identify their available resources and schedule them to perform a service.

The organization that provides the services needs to implement those services in the most effective manner possible. This requirement involves scheduling and performing the service in a timely manner. Furthermore, you need to ensure that whoever performs the service is qualified and has the accurate equipment to do the job. Regardless of the technician's skill level, they won't be able to complete the service without the necessary equipment.

- Configure Customer Service scheduling
- Schedule services with Customer Service scheduling

Lab Practice:

> *Lab: Configure Customer Service Scheduling*
> *Lab: Define Services*

After completing this module, students will be able to:

- Facilities, equipment, and people can be defined as resources used to perform services
- Organization Units define the physical locations where services are scheduled
- Schedule service activities using schedule assistant and control the time slots with fulfillment preferences

Learning Path 9: Analytics and 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
- Get started with Customer Service Insights
- Create visualizations for Customer Service
- Omnichannel Insights

Lab Practice:

> *Lab: Self Practice recommended. No official Lab is available*

After completing this module, students will be able to:

- Enable Customer Service Insights to monitor KPIs for Customer Service
- Many report and visualization options available for Customer Service
- Connect Power BI to Dataverse to create powerful visualization on Customer Service data

Learning Path 10: Connected Customer Service

Dynamics 365 Connected Customer Service is a solution designed to help organizations provide better customer service and support by leveraging data from various sources and integrating it into the customer service process.

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

Lab Practice:

Lab: Self Practice recommended. No official Lab is available

After completing this module, students will be able to:

- Connected Customer Service is supported by Azure IoT hub and Azure IoT Central solutions
- Customer asset records are linked to IoT device records and IoT alerts raised are linked to the IoT devices
- Commands can be sent to connected devices

Learning Path 11: Power Platform for Customer Service

Microsoft Power Platform is a suite of apps, services, connectors, and a data platform that provides you with an opportunity to build custom apps for your business needs. Microsoft Power Platform consists of four key products: Power Apps, Power Automate, Power BI, and Power Virtual Agents.

This module focuses on Microsoft Power Apps and how you can use it together with Microsoft Dynamics 365 Customer Service. This module doesn't provide an in-depth explanation of how to create tables or build apps, but it does explain how you can use Power Apps with Dynamics 365 Customer Service. The summary unit of this module provides links to other learning modules for the building of apps.

Lessons
- Create custom apps for Dynamics 365 Customer Service
- Integrate a Power Virtual Agents bot with Omnichannel for Customer Service

Lab Practice:

Lab: Self Practice recommended. No official Lab is available

After completing this module, students will be able to:

- Use the Power Platform for requirements not met by Customer Service features and functionality
- Use the self-service portal app to enable customers to access their cases
- Use Power Virtual Agents with Omnichannel to automate routine support interactions