Microsoft Dynamics 365
The Complete Business Computing Solution

MB – 230

Microsoft Dynamics 365 Customer Service Functional Consultant

Overview

As a candidate for this exam, you're a functional consultant with customer service expertise. You're responsible for implementing solutions that focus upon:

- Customer service
- Quality
- Reliability
- Efficiency
- Customer satisfaction

You design and implement service management processes and automation in collaboration with solution architects and developers. You coordinate with customer engagement administrators to implement and upgrade customer service components including:

- Omnichannel engagement
- Collaboration
- Knowledge management
- Customer feedback
- Connected services

You must have strong applied knowledge of customer service including in-depth understanding of cases, knowledge management, queues, entitlements, resource scheduling, service-level agreements (SLAs), AI insights and visualizations, connected services, Microsoft Copilot Studio, Customer Service applications, Customer Voice, basic and unified routing, and Omnichannel for Customer Service.

As a functional consultant, your knowledge should include:

- Comprehensive understanding of the customer service application's role in relationship to the Dynamics 365 suite of apps.
- Basic understanding of the solution architecture.

Prerequisites

Participants interested in taking the MB-230 course should meet the following prerequisites to ensure they can fully benefit from the course content:

- Familiarity with the general navigation, basic functionalities, and purpose of Dynamics 365 applications.
- Familiarity with the core functionalities of Dynamics 365, such as account and contact management.
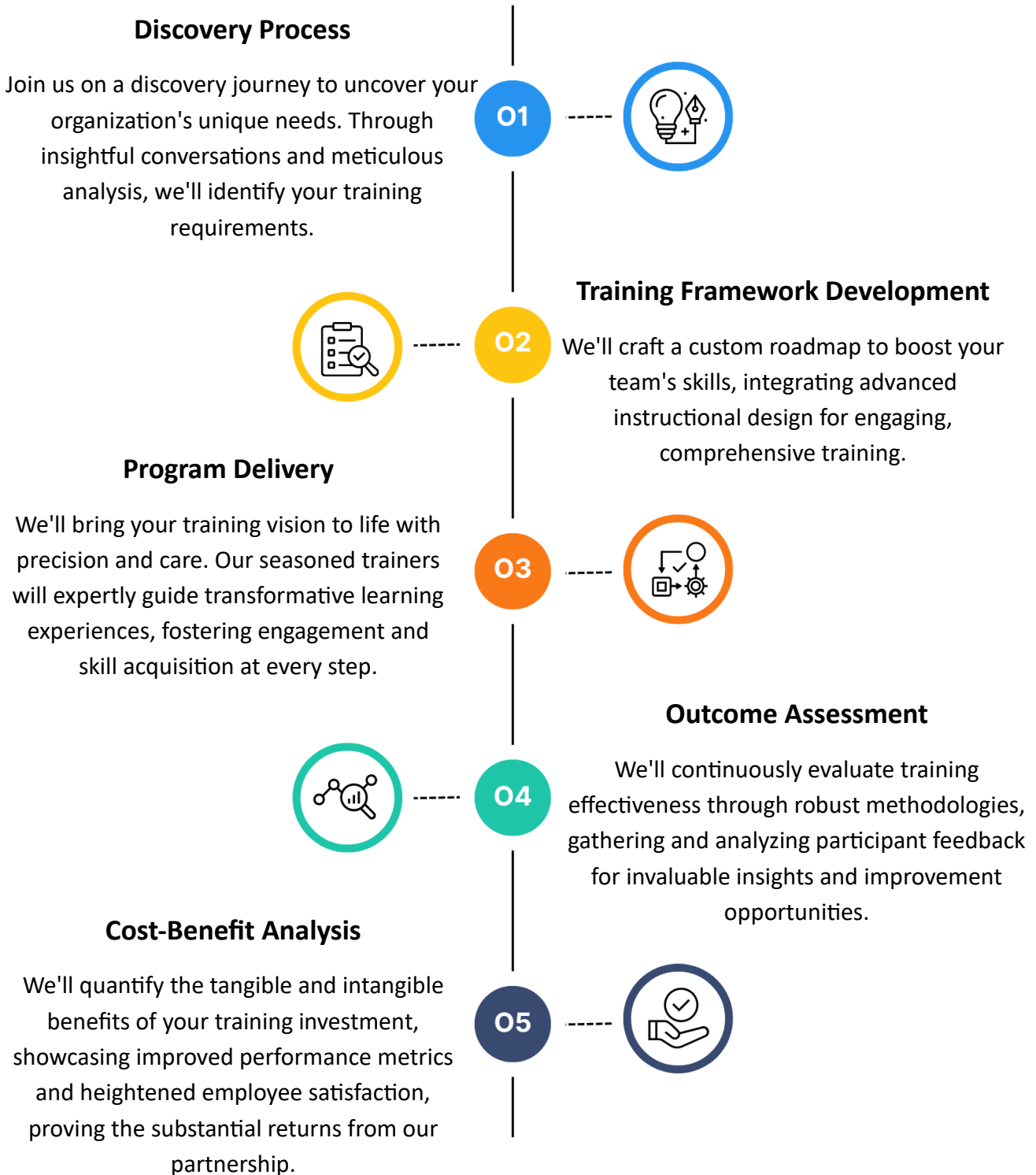- Practical experience working in a customer service role is beneficial.

Course Level

- Intermediate

Course Duration

- 4 Day – 32 Hours

Creating Tailor - Made Training Programs to Meet Your Specific Goals

Discovery Process

Join us on a discovery journey to uncover your organization's unique needs. Through insightful conversations and meticulous analysis, we'll identify your training requirements.

O1

Training Framework Development

O2

We'll craft a custom roadmap to boost your team's skills, integrating advanced instructional design for engaging, comprehensive training.

Program Delivery

We'll bring your training vision to life with precision and care. Our seasoned trainers will expertly guide transformative learning experiences, fostering engagement and skill acquisition at every step.

O3

Outcome Assessment

O4

We'll continuously evaluate training effectiveness through robust methodologies, gathering and analyzing participant feedback for invaluable insights and improvement opportunities.

Cost-Benefit Analysis

We'll quantify the tangible and intangible benefits of your training investment, showcasing improved performance metrics and heightened employee satisfaction, proving the substantial returns from our partnership.

O5

Course Outline

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.

Module 1: Case Management
- Lesson: Get started with Dynamics 365 Customer Service
- Lesson: Managing cases with Dynamics 365 Customer Service
- Lesson: Use Microsoft Dynamics 365 Customer Service queues to manage case workloads
- Lesson: Create or update records automatically in Customer Service Hub
- Lesson: Unified routing in Dynamics 365 Customer Service

Module 2: Entitlements and Service Level Agreements
- Lesson: Entitlements
- Lesson: Service Level Agreements

Module 3: Knowledge Management
- Lesson: Create knowledge management solutions in Dynamics 365 Customer Service
- Lesson: Configure knowledge management article searching functionality
- Lesson: Use knowledge articles to resolve Dynamics 365 Customer Service cases

Module 4: Multi-Session Experiences
- Lesson: Enhance agent productivity with Customer Service workspace
- Lesson: Create custom experiences for agents with the App profile manager in Customer Service

Module 5: Routing
- Lesson: Examine routing options available
- Lesson: Basic routing
- Lesson: Getting Started with Unified Routing

Module 6: Omnichannel for Dynamics 365 Customer Service
- Lesson: Get started with Omnichannel for Customer Service
- Lesson: Configure message channels in Omnichannel for Customer Service
- Lesson: Deploy chat widgets in Omnichannel for Customer Service

Module 7: Customer Voice
- Lesson: Create a survey project with Dynamics 365 Customer Voice
- Lesson: Create surveys with Dynamics 365 Customer Voice
- Lesson: Send Dynamics 365 Customer Voice surveys
- Lesson: Automate Dynamics 365 Customer Voice surveys with Power Automate

Module 8: Service Scheduling
- Lesson: Configure Customer Service scheduling
- Lesson: Schedule services with Customer Service scheduling

Module 9: Analytics and Insights
- Lesson: Get started with Customer Service Insights
- Lesson: Create visualizations for Customer Service
- Lesson: Omnichannel Insights
- Lesson: Connected Customer Service

Module 10: Connected Customer Service
- Lesson: Get started with Connected Customer Service for Dynamics 365 and Azure IoT
- Lesson: Register and manage devices with Connected Customer Service for Dynamics 365 and Azure IoT

Module 11: Power Platform for Customer Service
- Lesson: Create custom apps for Dynamics 365 Customer Service
- Lesson: Integrate a Power Virtual Agents bot with Omnichannel for Customer Service

Indus Tech Services

Who We Are....

Indus Tech Services is an IT company that specializes in providing comprehensive training, consulting & implementation services for software solutions designed to address the diverse business challenges faced by organizations today. With a passion for technology and a deep understanding of business processes, Indus Tech is committed to empowering businesses to optimize their operations, boost productivity, and drive sustainable growth.

Why Choose Us...

From time to time, life serves up a profound nudge, urging us to step beyond our routines and make a difference in the world. Indus Tech Services emerged from one such compelling wake-up call. We are not just a company; we are a dedicated force with a belief in providing solutions to organizations, regardless of their size, and we infuse a human touch into everything we do.

Our Expertise

With over 25 years of collective experience navigating the intricacies of daily business transactions, irrespective of geographical, cultural, time zone, or language barriers, our team has honed their expertise to meet any challenge head-on. This wealth of experience has armed our resources with an unparalleled understanding and skill set to tackle a broad spectrum of obstacles.

Training

With two decades of unwavering commitment and a global footprint, our company is a true pioneer in the fields of linguistic, transactional, technical, and behavioural training for some of the world's largest corporate entities. Our unparalleled expertise has been refined through years of dedication and innovation, making us the go-to choice for businesses seeking transformative training solutions.

Consulting

Our company has been at the forefront of providing world-class IT consulting services to organizations spanning the globe. With an extensive and proven track record, we have honed our expertise to meet the ever-evolving technological needs and challenges faced by businesses, regardless of their scale or industry.

Implementation

Our experience covers a broad spectrum of IT implementation services, including system integration, software deployment, network architecture, cloud migration, and infrastructure setup. We understand that the successful execution of IT projects is pivotal to an organization's growth and efficiency. Therefore, we bring a depth of knowledge and a commitment to delivering results that set us apart.

To know more contact us at info@industechservices.com or call us at +91 - 99961 61170.