

# Microsoft Dynamics 365 Customer Service

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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.

## 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.

## Skills Gained

After completing this course, you will be able to:

- 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

## Prerequisites

This course is designed for persons who are aspiring to the Microsoft 365 Enterprise Admin role and have completed one of the Microsoft 365 work load administrator certification paths.

## Course Details

### Outline

- Get started with Dynamics 365 Customer Service

- Managing cases with Dynamics 365 Customer Service Hub
- Use Microsoft Dynamics 365 Customer Service queues to manage case workloads
- Create or update records automatically in Customer Service Hub
- Get started with unified routing for Dynamics 365 Customer Service
- Create and manage entitlements in Microsoft Dynamics 365 Customer Service
- Create knowledge management solutions in Dynamics 365 Customer Service
- Use knowledge articles to resolve Dynamics 365 Customer Service cases
- Create a survey project with Dynamics 365 Customer Voice
- Create customer surveys with Dynamics 365 Customer Voice
- Send Dynamics 365 Customer Voice surveys
- Automate Dynamics 365 Customer Voice surveys with Power Automate
- Set up Customer Service scheduling
- Schedule services with Customer Service scheduling
- Enhance agent productivity with Customer Service workspace
- Create custom experiences for agents with agent experience profiles in Customer Service
- Get started with Omnichannel for Customer Service
- Route and distribute work with unified routing in Dynamics 365 Customer Service
- Deploy an SMS channel in Omnichannel for Dynamics 365 Customer Service
- Deploy chat widgets with Omnichannel for Dynamics 365 Customer Service
- Create smart assist solutions in Omnichannel for Dynamics 365 Customer Service
- Get started with Customer Service Insights
- Create visualizations for Dynamics 365 Customer Service
- 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
- Create custom apps for Dynamics 365 Customer Service
- Integrate a Microsoft Copilot Studio copilot with Omnichannel for Customer Service

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