



Course 81057 • Microsoft Dynamics 365 Customer Service Workshop (CRM)

Length

- 1 day

Prerequisites

- Dynamics 365 basic customer/account entry information

Audience

- Power Users or Administrators of the Dynamics 365 (CRM) Customer Service Application
- Customer Service Managers or Representatives using Dynamics software

What You'll Learn

- Understand Service Management
- Case Management (The core element of service)
- Knowledge Base and Templates
- Service Queue Management
- Service Level Agreements and Entitlements
- The Interactive Service Hub to improve customer service
- Voice of the Customer in Microsoft Dynamics 365 for Customer Service
- Customer Service and Field Service
- Service Analysis and Reporting

This one-day instructor-led workshop provides students who work with Customer Service in Dynamics CRM, Plan 1 or Customer Engagement versions with the knowledge and skills to manage the Dynamics 365 (CRM) Customer Service application. Additionally, it will help individuals who develop applications work with the Dynamics 365 (CRM) Customer Service Module.

Workshop Outline

Module 1: Introduction to Service Management

- The features of Dynamics 365 Customer Engagement Service Module
- Sales vs Service
- Customer Service after the sale
- Managing Customer Service
- Business Considerations and Configuration Settings for Service Management
- Examples of Dynamics 365 Customer Service

Module 2: Case Management (The core element of service)

- Cases or Incidents are the basic premise
- Create and manage a case
- Establishing a case, attaching to a customer
- Add a phone call, task, email, or appointment activity to a case
- Find what's assigned to you in a queue
- Assign an activity to a user or queue
- Merge similar cases
- Create and manage parent and child cases
- Parent/child case settings
- Case routing rules
 - Automatically create case from email
 - Automatically create/update record
- Case Resolution Processes

- Automating Case Resolution with Business Process Flows

Module 3: Knowledge Base and Templates

- Knowledge management setup
- Templates and publishing
- Consistent Messaging
- Creating Knowledge Base Template
- Creating Knowledge Base Articles
- Creating email Templates
- Creating emails for Customers
- Emailing Knowledge Base Articles

Module 4: Service Queue Management

- Service Queues overview
- Establishing a Framework of Queues to process cases
- Types of queues
- Moving and Escalating Cases
- Monitoring progress

Module 5: Service Level Agreements and Entitlements

- Service level agreements and entitlements
- Service Contracts and Service Levels
- Entitlement channels and allotments
- Hours of coverage and holiday schedule
- Allotments: minutes or incidents
- Service Contract Templates
- Selling Service Contracts and Entitlements

Module 6: The Interactive Service Hub to Improve Customer Service

- Monitor Cases
- Determine Actions
- Multi-Stream Dashboards

Module 7: Voice of the Customer in Microsoft Dynamics 365 for Customer Service

- Survey Creation
- Distribution and Responses
- Reporting and Analytics

Module 8: Customer Service and Field Service

- The case for Field Service
- Resource Management
- Service Appointment Scheduling
- The two technologies Service Scheduling and Field Service

Module 9: Service Analysis and Reporting

- Advance Find
- Service Reports
- Export to Excel
- Service Dashboards
- Power BI Dashboards for Customer Service

Module 10: Course Review

- Introduction to Service Management
- Case Management (The core element of service)
- Knowledge Base and Templates
- Service Queue Management
- Service Level Agreements and Entitlements
- The Interactive Service Hub to improve customer service
- Voice of the Customer in Microsoft Dynamics 365 for Customer Service
- Customer Service and Field Service
- Service Analysis and Reporting
- Microsoft Dynamics 365 for Customer Service Exam MB2-718 Review