

PROFESSIONAL COURSE OUTLINE

Microsoft

MB-230T01

Dynamics 365 Customer Service Functional Consultant Associate

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.

Microsoft Dynamics 365 & Power Platform Solutions

Intermediate

Dynamics 365

PROGRAM CODE

MB-230T01

DELIVERY

Virtual, On-site, or Hybrid

DURATION

4 days

CERTIFICATION

Microsoft Certified:
Dynamics 365 Customer
Service Functional
Consultant Associate

AUDIENCE PROFILE

Who This Program Is For

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.

PROGRAM SUMMARY

What This Course Covers

As a candidate for this certification, you're a functional consultant with customer service expertise.

TAILORED DELIVERY

Adapt the program around your team.

This outline can be adapted for virtual, on-site, or hybrid delivery, with emphasis adjusted for your team's platform priorities, role mix, and implementation goals.

Enterprise-ready delivery format

VNode ITeS can align labs, examples, delivery pace, and assessment checkpoints to the required audience profile while preserving the official program sequence where applicable.



Plan the next session

We can tune this outline around your delivery goals and team mix.

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COMPLETE MODULE SEQUENCE

Module Flow and Topic Coverage

The structure below presents the current delivery flow for this program, including the associated topics covered under each module.

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MODULE 1

Work with cases in Dynamics 365 Customer Service

This learning path focuses on 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.

- Get started with Dynamics 365 Customer Service
- Managing cases with Dynamics 365 Customer Service Hub
- Manage cases with Dynamics 365 Customer Service workspace
- Use Microsoft Dynamics 365 Customer Service queues to manage case workloads
- Service representative collaboration in Dynamics 365 Customer Service
- Configure Copilot in Dynamics 365 Customer Service
- Create or update records automatically in Customer Service Hub

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MODULE 2

Work with entitlements and service level agreements in Dynamics 365 Customer Service

This learning path focuses on working with entitlements and service level agreements in Microsoft Dynamics 365 Customer Service.

- Work with service-level agreements in Dynamics 365 Customer Service
- Create and manage entitlements in Microsoft Dynamics 365 Customer Service

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MODULE 3

Work with Knowledge Management Solutions in Dynamics 365 Customer Service

This learning path focuses on working with Knowledge Management Solutions in Microsoft Dynamics 365 Customer Service.

- Create knowledge management solutions in Dynamics 365 Customer Service
- Search and filter knowledge articles by using Dynamics 365 Customer Service
- Use knowledge articles to resolve Dynamics 365 Customer Service cases

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MODULE 4

Help service reps be more productive in Dynamics 365 Customer Service

Do you want to improve your service representative's productivity? This path discusses options to help service reps be more productive when using the Customer Service app.

- Create custom experiences for service representatives with agent experience profiles in Customer Service
- Enhance representative productivity with Customer Service workspace
- Manage cases with Dynamics 365 Customer Service workspace
- Enhance service representative productivity and personalization in Omnichannel for Customer Service
- Enhance service representative productivity and personalization in Customer Service Hub
- Get started with Dynamics 365 Productivity Tools
- Create smart assist solutions in Contact Center for Dynamics 365 Customer Service

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MODULE 5

Route and distribute work in Dynamics 365 Customer Service

This learning path describes how to route and distribute work using unified routing in Dynamics 365 Customer Service.

- Get started with unified routing for Dynamics 365 Customer Service
- Route and distribute work with unified routing in Dynamics 365 Customer Service
- Use skill-based routing in Dynamics 365 Customer Service
- Entity record routing with Omnichannel for Dynamics 365 Customer Service

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MODULE 6

Connect and engage with customers with 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 the 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.

- Get started with Omnichannel for Customer Service
- Deploy chat widgets with Omnichannel for Dynamics 365 Customer Service
- Deploy a Voice channel in Dynamics 365 Customer Service
- Deploy an SMS channel in Omnichannel for Dynamics 365 Customer Service
- Deploy social messaging channels in Omnichannel for Dynamics 365 Customer Service
- Set up Apple Message for Business and Google Business Messages as channels in Dynamics 365 Customer Service
- Integrate an agent for Contact Center and Dynamics 365 Customer Service

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MODULE 7

Create surveys with Dynamics 365 Customer Voice

Learn how to create and send surveys with Dynamics 365 Customer Voice

- 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
- Embed surveys in your website with Dynamics 365 Customer Voice
- Create customer Power BI reports in Dynamics 365 Customer Voice

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MODULE 8

Get started with Dynamics 365 Customer Service scheduling

Do you need to schedule staff and other resources to service customers? This learning path discusses how to configure and use Customer Service scheduling.

- Set up Customer Service scheduling
- Schedule services with Customer Service scheduling

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MODULE 9

Work with Customer Service Insights

Learn how to configure and work with Customer Service Insights.

- Get started with Customer Service Insights
- Create visualizations for Dynamics 365 Customer Service

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