

MICROSOFT OFFICIAL CURRICULUM

Microsoft

MB-230T01

Implement customer service solutions using Microsoft Dynamics 365 Customer Service

Official Microsoft Learn-aligned instructor-led program for Implement customer service solutions using Microsoft Dynamics 365 Customer Service.

Microsoft Dynamics 365 & Power Platform Solutions

Intermediate

Dynamics 365

DURATION
4 days

LEVEL
Intermediate

FORMAT
Virtual, On-site, or Hybrid

CERTIFICATION
MB-230T01

AUDIENCE PROFILE

Built for these roles

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.

OVERVIEW

Executive overview

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.

PROGRAM OUTCOMES

Capabilities your teams will gain

- Strengthen capability in microsoft dynamics 365 & power platform solutions scenarios
- Strengthen capability in dynamics 365 scenarios
- Strengthen capability in role-based scenarios

ENTERPRISE CUSTOMIZATION

Enterprise customization

Tailor this program to your organization's priorities: Builds current Microsoft credential readiness for Dynamics 365 Customer Service Functional Consultant Associate using the official Microsoft Learn skill outline.

Customization options

- Align labs to your production environment and platform priorities
- Add readiness reviews and instructor-led practice sessions
- Extend into project-specific architecture or delivery coaching

CURRICULUM

Curriculum roadmap

1

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

2

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

3

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.

- Configure knowledge management in Dynamics 365 Customer Service and Contact Center
- Search and filter knowledge articles by using Dynamics 365 Customer Service
- Use knowledge articles to resolve Dynamics 365 Customer Service cases

TALK TO US

-  info@vnodeites.com
-  +91 9779 91 4792
-  WhatsApp · +91 9779 91 4792
-  +91 9419 11 4792

OFFICE

DLF Cyber City, Gurugram
Haryana — India
Azure · AI · Data · Power Platform

4

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

5

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

6

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

TALK TO US

-  info@vnodeites.com
-  +91 9779 91 4792
-  WhatsApp · +91 9779 91 4792
-  +91 9419 11 4792

OFFICE

DLF Cyber City, Gurugram
Haryana — India
Azure · AI · Data · Power Platform

7

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

8

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

9

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

PRIVATE DELIVERY

Plan a private cohort for your team

Scope delivery format, role mix, and rollout timeline with our solutions team.

Plan Private Delivery

Book advisory call

vnodeites.com

TALK TO US

-  info@vnodeites.com
-  +91 9779 91 4792
-  WhatsApp · +91 9779 91 4792
-  +91 9419 11 4792

OFFICE

DLF Cyber City, Gurugram
Haryana — India
Azure · AI · Data · Power Platform