Customer Service for Dynamics 365

Course Level: 100

Customer Service for Dynamics 365 can track all customer issues and record all interactions on the case record. The application allows for the creation of queues and routing rules to ensure cases are routed to the appropriate users, and through use of the knowledge base empower those users to resolve customer issues quickly and consistently. Organizations can also leverage service level agreements and track service terms through the entitlements feature, while managers can utilize reports and dashboards to manage performance and productivity. This instructor-led course is a one-day deep dive into the default record types, processes and configuration of Customer Service for Customer Service.

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At A Glance:
Customer Service for Dynamics 365

Why Enroll?

Empower Admins; Power Users; & Customizers to gain a deep understanding of Customer Service for Dynamics 365

Who to Enroll?

System Administrators -
Power Users -
Customizers -
Developers -

Key Takeaways

Case management; Case reporting; Knowledge management; Service settings; Queues and Queue Items; Goals; Service Level Agreements; Entitlements

Register

Register for Customer Service for Dynamics 365 today!

Click to Register.

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About this
Training

Intended Audience

This course is designed to support individuals who will be setting up and administering Customer Service within Dynamics 365. It is not intended for front of house users.

Required Prerequisites

Participants are *highly* advised to be comfortable and confident with the following skills and concepts for a successful learning experience:
- Search; navigation; activities; and advanced find within Microsoft Dynamics 365
- Creating views; charts; and dashboards
- Data entry in forms and process flows

Recommended Prerequisites

Familiarity with the following skills/concepts is recommended:
- Understanding of data or relational databases is helpful
- Dynamics 365 data structure and user experience customization
- Dynamics 365 University CRM Boot Camp is recommended

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Key
Takeaways

This Training Will Allow You To:

- Understand the default record types and built in processes and process flows for case management and knowledge article management
- Understanding how and when to create queues and assign records to queues
- Understand the capabilities and configuration of service level agreements and entitlements
- Gain familiarity with customer service specific automation, including case routing rules, record creation and update rules and the email to case process

DAY 1

CUSTOMER SERVICE

Case Management
- Phone to Case Process Flow
- Case Actions
  - Creating Cases
  - Resolving Cases
  - Merge Cases
  - Other Case Actions
- Parent Child Case Settings

Case Reporting
- Default Views; Charts & Dashboards
- Default Reports & Document Templates
- Add-Ons Available from Microsoft
  - Customer Service Insights
  - Power BI Customer Service Analytics App

Knowledge Management
- Knowledge Base
  - Article Features
  - Article Management
  - Using Knowledge with Cases
- Service Management Settings
  - Subject Tree
  - Categories
- Reporting
  - Knowledge Manager Dashboard
  - My Knowledge Dashboard

Teams and Queues
- Owner Teams
- Queues
  - Purpose
  - Creating Queues
- Queue Items
  - Details
  - Add and Remove
  - Pick and Release
  - Record Ownership

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DAY 1

CUSTOMER SERVICE

Goals
- Overview
- Components
  - Metric
  - Goal Record
  - Parent & Child Goals
  - Roll Up Queries
- Reporting

Service Level Agreements (SLAs)
- Overview
- Creating SLAs
- Holiday and Service Schedules
- SLAs on Other Entities

Entitlements
- Overview
- Creating Entitlements
- Using Entitlements with Cases
- Restricting Based on Terms

Automation
- Case Assignment and Routing Rules
- Record Creation and Update Rules
- Email to Case Process

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DYNAMICS 365 UNIVERSITY

Dynamics 365 University is designed to be foundational training for those responsible for implementing and supporting Dynamics 365 within your organization. Dynamics 365 University focuses on out-of-the-box features and functionality training for your core team. Participants get an understanding of how the Dynamics 365 processes and architecture can be leveraged and customized to support your unique organizational processes.

GET STARTED