

Microsoft Dynamics 365 for Customer Service MS-55260

Modality: Virtual Classroom

Duration: 1 Day

About this course:

This online training program gives students a comprehensive hands-on understanding of the MS Dynamics 365 Service features and components.

Participants in this program will gain a thorough knowledge of the Service Case Management Process in MS Dynamics 365, such as discovering how to monitor and address customer requests through Case Records, working on issues utilizing Queues, use Service Level Agreements (SLA) to handle customer entitlements and using the Knowledge Base to solve customer issues more quickly. Often included in this program are the Interactive Service Hub and Business Analysis features including Service Goal Management, Service Reports, Service Dashboards, and Charts.

The course covers all MS Dynamics 365 Business and Enterprise Editions as well as Online and On-premise implementations.

Course Objective:

- Recognize the Case Management Basics. In MS Dynamics 365, you can monitor, handle and address customer service queries using Case records
- How to build and manage Queues, and use Queue's to interact with other CSR and Teams on Cases.
- Understand the Knowledge Base approval method
- How to interact successfully with the Visualizations, Dashboards, and Interactive Service Hub Filters
- Consider the MS Dynamics 365 tools and features that exist for Service Managers and CSR
- Know the MS Dynamics 365 Service Case Management Phase Stages
- Techniques to navigate the knowledge base and link the articles of information to the records of cases
- Understand how to resolve, assign, reactivate, delete and cancel Case records
- Know the importance of SLA and how to build a Customer Plan and apply SLAs to Client and Case Reports by Entitlements

- Method to navigate and provision the Interactive Service Hub
- Use the Reporting Wizard in MS Dynamics 365 to discover the company reports and build a customized service report
- Discover service dashboards and charts and build an MS Dynamics 365 custom service dashboard
- Techniques to apply the Routing Case Rules and use Queue Objects in Processes
- Build and maintain collaborative Service Hub Knowledge Articles
- Know the importance of MS Dynamics 365 Service Goal Management and Metrics

Audience:

- This online training program is designed for End-users, Sales Managers, and CSR who already have an interest in MS Dynamics 365's Service components. Participants must have a current working knowledge of either MS Dynamics CRM or MS Dynamics 365. Participants should at least attend the ' Introduction to MS Dynamics 365 ' pre-requisite course.

Course Outline:

Module 1: Introduction

This module provides the attendee with an introduction to the concept of Customer Service the Microsoft Dynamics 365.

Lessons

- Examine common Customer Service Scenarios
- An Introduction to Service in Dynamics 365
- The Dynamics 365 Platform
- Dynamics 365 Service Fundamentals
- Security Considerations
- Where to get Help
- Further Reading and Resources

Lab : Service in Dynamics 365 Orientation

- Explore the Service features in Dynamics 365

After completing this module, students will be able to:

- Understand the Customer Service process in regards to the Dynamics 365 Service App.
- Be familiar with the Service features of the Dynamics 365 App.
- Understand the impact of Security configuration on the Dynamics 365 Service App.

- Know where to get help when navigating and using the Dynamics 365 Service App.
- Be familiar with the further reading and resources available to users.

Module 2: Case Management

This module presents the Service Case Management Process in Microsoft Dynamics 365. We also examine the various stages a Case record can go through during its lifespan, and how Service Level Agreements can be used with Cases to define and track Service Entitlements.

Lessons

- The Case Management Process
- Working with Case Records
- Working with the Case Form
- Case Assignment and Routing
- Cases and Activities
- Resolving Cases
- Reactivating, Cancelling and Deleting Cases
- Service Level Agreements

Lab : Working with Cases

- Create a Case record
- Assign a Case record
- Resolve a Case record
- Reactivate a Case record
- Cancel a Case record

Lab : Service Level Agreements and Cases

- Create a Customer Schedule for the SLA
- Create a new Service Level Agreement
- Activate a Service Level Agreement
- Create an Entitlement
- Relate a Case to a Service Level Agreement

After completing this module, students will be able to:

- Understand the Case Resolution Process in regards to the Dynamics 365 Service App.
- Know how to create, assign, manage and resolve Case Records.
- Understand the significance of related Case Activity Records.
- Work with Service Level Agreements and customer Entitlements.

Module 3: Working with Queues

This module presents the concepts of Service Queues in Microsoft Dynamics 365. We examine common Service scenarios where Queues can be useful, and step through the process to create and manage Queues. We also look at how Workflow and Routing Rules can automate Case assignment using Queues.

Lessons

- Introduction to Service Queues
- Common Service Queue Scenarios
- Creating and Managing Queues
- Working with Queue Items
- Case Routing Rules
- Processes and Queues

Lab : Create a Case Routing Queue

- Creating Queues
- Create a Case Routing Rule
- Route a Case to a Queue
- Working with Queues and Queue Items

After completing this module, students will be able to:

- Understand the benefits of Queues and how they are used within the Case Resolution Process.
- Add records to Queues and manage Queue Items.
- Implement Case Routing Rules to automate Case assignment.
- Automate Queue Item management using Processes.

Module 4: Using the Knowledge Base

In this module we will start to look at the Knowledge Base in Microsoft Dynamics 365. We look at where the Knowledge Base fits into the Service Management Process, present Knowledge Base Article Templates and examine the Article approval process. Finally, we wrap up with searching the Knowledge Base and relating Articles to Case records.

Lessons

- Introduction to the Knowledge Base
- Knowledge Base Concepts
- Working with Articles
- Searching the Knowledge Base
- Email a Knowledge Article

Lab : Create Knowledge Base Articles

- Create an Article Template
- Update the Subject Tree
- Create a new Knowledge Base Article
- Submit a Knowledge Base Article for Approval
- Reject a Knowledge Base Article
- Approve a Knowledge Base Article

Lab : Create a Case and interact with the Knowledge Base

- Create a new Case
- Relate a Knowledge Base Article to a Case
- Email a Knowledge Base Article to a Customer

After completing this module, students will be able to:

- Work with the Knowledge Base in Dynamics 365.
- Create and manage Knowledge Base Articles and Article Templates.
- Be familiar with the Article Approval Process.
- Search the Knowledge Base to resolve a Case Record.
- Email an Article to a Customer to resolve a Case Record.

Module 5: The Interactive Service Hub

This module presents how CSR's and Service Managers can benefit from the features provided by the Interactive Service Hub. We look at the rich controls and dynamic streams of information presented by this alternative interface to Microsoft Dynamics 365. Finally, we look at the alternative approaches to Case management, Knowledge Articles and tracking Service information.

Lessons

- Introduction the Interactive Service Hub
- The Tier 1 Dashboard
- The Tier 2 Dashboard
- The My Knowledge Dashboard
- The Knowledge Manager Dashboard
- Working with Cases in the Hub
- Working with Knowledge Articles in the Hub
- Working with Visualizations and Filters in the Hub

Lab : Using the Interactive Service Hub

- Explore the Interactive Service Hub
- Manage Streams in the Interactive Service Hub
- Resolve a Case in the Interactive Service Hub
- Create a KB Article in the Interactive Service Hub
- Manage KB Articles in the Interactive Service Hub

- Relating a Case to an Interactive Service Hub KB Article

After completing this module, students will be able to:

- Be familiar with the Interactive Service Hub in Dynamics 365
- Interact with the Interactive Service Hub Dashboards, Streams, Indicators and Filters.
- Manage Case Records through the Interactive Service Hub.
- Work with Knowledge Base Articles through the Interactive Service Hub.

Module 6: Service Analysis

This module looks at the different methods available to analyze service information that is stored in Microsoft Dynamics 365. We look at the out of the box service reports and the process to create a custom report using the Dynamics 365 Report Wizard. This module also demonstrates the Chart and Dashboard designer, as well as reviewing the out of the box service dashboards to analyze service data.

Lessons

- Introduction to Service Analysis in Dynamics 365
- The Service Reports
- The Reporting Wizard
- Working with Service Charts
- Working with Service Dashboards
- Working with Service Goals and Metrics

Lab : Explore the Service Reports

- Exploring the Case Summary Table Report
- Exploring the Neglected Cases Report

Lab : Service Goals and Metrics

- Create Goals for the Service Team
- Create a Personal View
- View Sales Goals and Chart

Lab : Explore the Service Charts and Dashboards

- Explore the Case Charts
- Create a custom Service Chart
- Explore the Service Dashboards
- Create a custom Service Dashboard

After completing this module, students will be able to:

- Understand the different ways to analyze Service data in Dynamics 365.
- Work with the 'out of the box' Service Reports in Dynamics 365.
- Create a custom Service report using the Reporting Wizard.
- Work with the Service Charts and Dashboards.

Create Service Goals and KPI Visualizations in Dynamics 365.