Dynamic 365 Customer Service

Course Modules

1: Introduction to Dynamics 365 Customer Service:
- Overview of the Dynamics 365 ecosystem
- Introduction to Dynamics 365 Customer Service
- Dynamic 365 role in customer relationship management

2: Navigating Dynamic 365 Customer Service:
- User interface & navigate in the Dynamics 365 CS app.
- Access and manage cases, knlg articles, & cus records

3: Case Management:
- Creating and managing customer cases
- Case resolution processes and workflows

4: Knowledge Base Management:
- Creating and managing knowledge articles
- Knowledge base search and utilization

5: Queue Management:
- Setting up and managing queues for case assignment
- Prioritizing and routing cases

6: Service Level Agreements (SLAs):
- Config and manage SLAs for response & resolution times
- SLA tracking and reporting

7: Customer Engagement:
- Managing customer interactions and communication
- Email integration and case communication tracking

8: Social Engagement:
- Monitoring and engaging with customers on social media
- Social listening and sentiment analysis

9: Unified Service Desk:
- Unified Service Desk for a unified view of customer intctn
- Customize and config of the Unified Service Desk

10: Mobile Customer Service:
- Using mobile apps for customer service activities
- Real-time updates and communication with customers

11: Voice of the Customer:
- Gathering feedback through surveys and feedback forms
- Analyzing customer feedback and insights

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12: Analytics and Reporting:
- Analyzing customer service performance
- Generating reports and dashboards

13: Integration with Other Modules:
- Integrate Dynamics 365 Customer Service with other Dynamics
- Integrate with Power Platform and other Microsoft tools

14: Customization and Configuration:
- Customizing forms, views, and reports
- Configuring business processes and workflows

15: Security and Access Control:
- Managing user roles and permissions
- Ensuring data security and compliance

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