

## **Microsoft Dynamics 365 for Customer Service**

### **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 1: 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 1: Working with Cases**

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

#### **Lab 2: 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 1: 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 1: 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 2: 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 1: 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 analyse 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 analyse 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 1: Explore the Service Reports**

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

### **Lab 2: Service Goals and Metrics**

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

### **Lab 3: Explore the Service Charts and Dashboards**

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