

# WorkshopPLUS - Dynamics 365 Customer Engagement: Introduction to Customer Service 1 Day with Lab

## WorkshopPLUS

**Focus Area:** Business/IT Alignment

**Duration:** 1 day

**Difficulty:** 100

### Overview

Learn how to use Dynamics 365 for Customer Service using the Customer Service Hub app. In this course you will gain hands-on experience managing cases, queues, entitlements and knowledge articles. You will also gain hands-on experience configuring customer service, SLAs, routing rules and automatic case creation.

### Objectives

After completing this training, students will be able to:

- Navigate the Dynamics 365 Customer Engagement Customer Service Hub app.
- Understand how the data is secured.
- Describe how to work with accounts and contacts.
- Create and manage cases.
- Understand how to utilize queues for case management.
- Create routing rules to automatically place cases in the correct queue.
- Configure the system to automatically create a case from an email.
- Configure service level agreements, holiday schedules and customer service schedules to drive metrics.
- Configure entitlements to manage the type of support a customer receives.
- Understand how to setup charts and dashboards within Dynamics 365 Customer Engagement.
- Create reports with the Report Wizard.

### Key Takeaways

#### Course Material

- Customer Service Hub and security.
- Manage accounts, contacts, cases and queues.
- Configure service terms.
- Create and manage knowledge articles.
- Configure routing rules and automatic case creation.

#### Hands-on Labs

- Most of the concepts covered above will be supported by hands-on labs and demos.

### Agenda

#### Morning

- Customer Service Hub and Security.
- Account, contacts. Cases and queues.
- Service Terms.

#### Afternoon

- Knowledge Base management.
- Automatic record creation and routing rules.
- Reports, Charts and Dashboards.

Plan for a full day. Early departure is not recommended.

## Course Details

### Module 1: Customer Service Hub and Security

- Overview of Dynamics 365.
- Introduction to the Customer Service Hub app.
- Security

### Module 2: Customers, Cases and Queues

- Accounts and contacts (Lab)
- Activities
- Cases (Lab)
- Queues (Lab)

### Module 3: Service Terms

- Entitlements (Lab)
- Holiday Schedules (Lab)
- Customer Service Schedules (Lab)
- Service Level Agreements (Lab)
- Service Configuration Settings

### Module 4: Knowledge Management

- Knowledge Articles (Lab)
- Knowledge Article Approval Process (Lab)
- Knowledge Article Templates (Lab)
- Embedded Knowledge Search

### Module 5: Automatic record creation and routing rules

- Routing Rules (Lab)
- Automatic record creation and update rules (Lab).

### Module 6: Reports, Charts and Dashboards

- Dynamics 365 Customer Engagement Charts (Lab).
- Dynamics 365 Customer Engagement Dashboards (Lab).
- Report Wizard (Lab).

## Recommended Qualifications

- Understanding of Customer Relationship Management concepts.

## Hardware Requirements

- An Intel Core-i5-based PC
- 4 GB RAM
- Windows 7 SP1 or later
- Internet access with at least 1 Mbps bandwidth per student.

## For more information

Contact your Microsoft Account Representative for further details.