

Dynamics 365 for Customer Services Teams

Course Overview

This course focuses on how an organisation can nurture customer satisfaction through automation of business processes within Microsoft Dynamics 365. This course guides you through the process of working with your customers in Microsoft Dynamics 365, including: resolution of customer complaints and services issues cost effectively, and provides insight on managing all related correspondence, documents, contacts and conversations. Every attendee receives a course manual and are guided through a lab scenario by a Microsoft Certified Trainer.

Duration

1 Day

Course Outline

Students will complete the following modules

Module 1: What is Dynamics 365?

In this module we'll explore:

- What Dynamics 365 is
- What Dynamics 365 is used for
- The key components that make up Dynamics 365: Sales, Marketing and Customer Services

Module 2: Registering for a Microsoft Dynamics 365 Trial

The instructor will step you through registering for a trial version of Dynamics 365.

Module 3: Overview of Dynamics 365 for Customer Services

In this module we'll take you through the key components of Dynamics 365:

- Cases
- Queue
- Activities
- Articles
- Contract

Module 4: Microsoft Dynamics 365 Customer service process flow

In this module, we'll take students through the Dynamics 365 Sales process flow:

- Learn how to resolve issues in an organisation

Module 5: Microsoft Dynamics 365- Customer service navigation

In this module, we'll take students through the Microsoft Dynamics Sales Navigation:

- Dynamics 365 Ribbon
- Various Entities that belong to the sales category
- Use default sales entity forms and check what kind of information's are stored by the sales entities

Our credentials



Module 6: Demonstration

- Create a new case
- Create SLA
- Add activities to the timeline
- View related cases
- Merge cases
- Research similar cases
- Research knowledge base
- Add case to a queue
- Resolve a case
- Convert case to an article

Audience

This course is designed for any employees in a customer service management, service-focus or customer-centric role.

Pre-Requisites

No previous experience is required for this course, however an understanding of the customer services process is ideal.

Learning Outcomes

After completing this course, students will be able to:

- Login and navigate Dynamics 365
- Create a new case
- Create SLA
- Add activities to the timeline
- View related cases
- Merge cases
- Research similar cases
- Research knowledge base
- Add case to a queue
- Resolve a case
- Convert case to an article