



Enterprise Computing Solutions - Education Services

TRAINING OFFERING

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MB-230T01: Microsoft Dynamics 365 Customer Service

CODE:	LÄNGE:	PREIS:
MCS_MB-230T01	24 Hours (3 Tage)	€2,485.00

Description

„Microsoft Dynamics 365 for Customer Service“ bietet jeder Organisation die Möglichkeit auf Kundenerfolg. Tools wie die automatische Fallerstellung und die Warteschlangenverwaltung machen es Ihnen möglich, Ihre Zeit dort zu investieren, wo Sie größeren Einfluss haben – direkt bei Ihren Kund*innen. Werden Sie Teil eines Teams weltweit anerkannter Expert*innen, die Sie ausführlich von der Fallerstellung über die Interaktion mit Kund*innen bis hin zum Lösen dieser Fälle begleiten. Sobald Sie diese Fälle gelöst haben, können Sie anhand der Datenanalyse die wichtigsten Details lernen, die Ihnen helfen, ähnliche Fälle schneller zu lösen oder neue Probleme ganz zu vermeiden.

Zielgruppe

Zu den Aufgaben des Dynamics 365-Modulbetreuers für den Kundendialog gehören Netzwerksuche, Erfassen von Bedürfnissen, die Einbeziehung von Fachexperten und Stakeholdern, das Übersetzen von sowie Lösungen und Anwendungen zu konfigurieren. Der/die Functional Consultant*in implementiert eine Lösung unter Verwendung von standardisierten Funktionen, codeloser Erweiterbarkeit, Anwendungs- und Service-Integrationen.

Voraussetzungen

Dieses Training richtet sich an Functional Consultants, die mit Dynamics 365 Customer Service arbeiten, oder an Functional Consultants, die mit anderen Dynamics 365-Anwendungen arbeiten und ihr Customer Service-Wissen erweitern möchten.

Inhalt

	Introducing Dynamics 365 Customer Service
	Customer Service core components
Get started with Dynamics 365 Customer Service	Understand the modern customer journey
	Case management overview
	Case creation and lifecycle
	Considerations for case creation automation
	Exercise - Create and resolve cases10 min
	Case management scenarios
	Case management dashboard scenarios
	Case management work with cases scenarios
Managing cases with Dynamics 365 Customer Service Hub	Work with status reason transitions
Use Microsoft Dynamics 365 Customer Service queues to manage case workloads	
Introduction to Microsoft Dynamics 365 queues	
Configure tables for queues	
Create a Microsoft Dynamics 365 queue	
Work with queues	
Routing rule sets	Create or update records automatically in Customer Service Hub
Introduction	
Set up rules to create or update records automatically	
Configure rules for creating or updating records automatically	
Map records manually with Power Automate	
Complete and activate your rule	
Use the activity monitor to review and track rules	Get started with unified routing for Dynamics 365 Customer Service

- Route cases by using basic routing rule sets
- Set up unified routing
- Create and manage users
- Create and manage queues for unified routing
- Set up workstreams for record routing
- Overview of entitlements
- Create entitlement records
- Work with entitlement channels
- Other considerations
- Define entitlement templates
- Knowledge management overview
- Create and define knowledge articles
- Knowledge article lifecycle
- Manage knowledge article versions, categories, and translations
- Knowledge article publication
- Knowledge article and case resolution overview
- Enable and configure entities for Knowledge Search
- Configure article search and display options
- Search for knowledge articles
- Use knowledge articles to resolve Dynamics 365 Customer Service cases
- Article analytics
- Dynamics 365 Customer Voice
- Projects in Dynamics 365 Customer Voice
- Create a survey project with Dynamics 365 Customer Voice
- Create your first project
- Survey headers and branding
- Add branching logic to surveys
- Personalize a survey with variables
- Add satisfaction metrics to a survey and project
- Create customer surveys with Dynamics 365 Customer Voice
- Add multiple languages for your surveys
- Create and personalize email templates
- Translate email templates into other languages
- Email a survey
- Upload CSV files
- Use links and QR codes
- Send Dynamics 365 Customer Voice surveys
- Analyze survey reports
- Send a survey with Power Automate
- Create an invitation
- Expand variables to further customize surveys
- Use the locale variable for multilingual surveys
- Use variables for follow-up actions
- Automate Dynamics 365 Customer Voice surveys with Power Automate
- Set up service scheduling
- Define resources
- Set up Customer Service scheduling
- Check your knowledge
- Schedule services with Customer Service scheduling
- Set up fulfillment preferences
- Create service activities
- Schedule service activities
- Enhance agent productivity with Customer Service workspace
- Explore the Customer Service workspace user interface
- View and edit records
- Work with case records
- Use the Productivity pane in Customer Service workspace
- Create custom experiences for agents with agent experience profiles in Customer Service
- Create and use agent experience profiles to manage apps
- Application tab templates
- Session templates
- Manage notification settings and templates
- Use templates in workstreams
- Use the agent interface
- Manage sessions and work with applications
- Work with conversations
- Work with customer information
- Helping an agent's productivity
- Helping an agent's productivity
- Route and distribute work with unified routing in Dynamics 365 Customer Service
- Set up work classification
- Route items to queues
- Set up work assignments in queues
- Get started with intelligent routing
- Diagnostics
- Deploy an SMS channel in Omnichannel for Dynamics 365 Customer Service

Configure phone numbers and messaging accounts
 Configure SMS workstream
 Configure SMS workstream options
 Route SMS conversations
 Configure Additional Settings
 Set up a workstream for chat
 Create a chat channel
 Allow chat transcripts and file downloads
 Work with prechat and post-chat surveys
 Embed a chat widget in a portal
 Use proactive chat
 Deploy chat widgets with Omnichannel for Dynamics 365 Customer Service
 Create smart assist solutions in Omnichannel for Dynamics 365 Customer Service
 Work with Microsoft Adaptive Cards
 Build a smart assist bot
 Integrate a smart assist bot with Omnichannel for Customer Service
 Configure Customer Service Insights
 Use Customer Service Analytics dashboards in Power BI
 Discover Customer Service Insights dashboards
 Discover Knowledge search analytics
 Create and use charts
 Create dashboards for Customer Service
 Use Power BI to view Customer Service data
 Choose a deployment type
 Install Connected Customer Service
 Customer assets and IoT alerts
 Get started with Connected Customer Service for Dynamics 365 and Azure IoT
 Register and manage devices with Connected Customer Service for Dynamics 365 and Azure IoT
 Generate alerts from IoT devices
 Device management and interaction
 Create and send commands to IoT devices
 Create custom apps for Dynamics 365 Customer Service
 Create Power Apps for Dynamics 365 Customer Service
 Deploy a self-service portal for Customer Service
 Customize case management
 Create an Azure Active Directory application
 Configure the Power Virtual Agents bot
 Configure Omnichannel for Customer Service
 Integrate a Power Virtual Agents bot with Omnichannel for Customer Service

Kurstermine

Datum	Lokation	Time Zone	Sprache	Type	Durchführungsgarantie	PREIS
10 Mar 2025	Wien	CET	German	Instructor Led Online		€2,485.00
11 Mar 2025	Wien	CET	German	Classroom		€2,485.00
02 Jun 2025	Wien	CEDT	German	Classroom		€2,485.00
02 Jun 2025	Wien	CEDT	German	Instructor Led Online		€2,485.00
25 Aug 2025	Wien	CEDT	German	Classroom		€2,485.00
25 Aug 2025	Wien	CEDT	German	Instructor Led Online		€2,485.00
24 Nov 2025	Wien	CET	German	Classroom		€2,485.00
24 Nov 2025	Wien	CET	German	Instructor Led Online		€2,485.00

Zusätzliche Information

[Diese Schulung ist auch als Vor-Ort-Schulung verfügbar. Bitte kontaktieren Sie uns, um mehr zu erfahren.](#)